**Public Employee
Retirement System of
Idaho**

2004
Employer Survey

Final
Report

January 2005

2004 Employer Survey

Public Employee Retirement System of Idaho

Final Report

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Date:
January 2005

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Executive Summary

In 2004, Clearwater Research, Inc., collected information from payroll and administrative professionals who work with PERSI about their satisfaction with PERSI services, experience with PERSI reporting, and the usefulness of PERSI support and information services. Clearwater Research conducted univariate and bivariate analyses of the 527 completed surveys to identify areas of excellence and opportunities to improve. This information will be used to guide future PERSI service offerings and administration.

The following sections highlight some of the results presented within the body of this report. Because of the nature and complexity of the research design and analysis, readers are cautioned against drawing strong conclusions based solely on this executive summary.

Overall Satisfaction

➤ In 2004, 94% of all employers surveyed reported being *satisfied* (either somewhat or extremely) overall with PERSI (also 94% in 2003).

Transmittal Report Processes

➤ In 2004, 90% (93% in 2003) of all employers surveyed reporting being *Satisfied* (either somewhat or extremely) with PERSI's transmittal reporting process.

➤ In 2004, 94% (94% in 2003) of all employers surveyed rated the submission of transmittal reports as *Easy* (somewhat or very).

➤ In 2004, 95% of employers surveyed reported that they agreed that PERSI effectively communicated transmittal report requirements (93% in 2003).

➤ Over the past twelve months, 27% (29% in 2003) of employers surveyed experienced problems with submitting reports to PERSI.

Annual Audit Processes

➤ A full 89% of employers surveyed were *Satisfied* (either somewhat or extremely) with the annual audit process (this question was not asked in 2003).

➤ Nearly all employers surveyed, 99%, reported that it was *Easy* (somewhat or very) to participate in the annual audit process (this question was not asked in 2003).

➤ Just over 85% of employers surveyed believed that the annual audit process was *Useful* (this question was not asked in 2003).

➤ In 2004, 88% of employers surveyed agreed that PERSI communicated annual audit expectations (89% in 2003)

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Information or Support Requests

➢ In 2004, 45% (42% in 2003) of employers surveyed had made 3 or more information or service requests of PERSI in the past year.

➢ In 2004, 30% of requests were regarding *transmittal reporting*, it was the single largest category (28% in 2003).

➢ In 2004, 85% (92% in 2003) of all information or service requests were made by phone. An increasing percentage of requests were made by e-mail, 7% in 2003 and 10% in 2004.

➢ In 2004, 95% of employers surveyed reported being *satisfied* (either somewhat or extremely) with the way their most recent information or service request was handled (97% in 2003).

➢ In 2004, 76% (75% in 2003) of all information and service requests were handled with *1* contact with PERSI.

➢ In 2004, 67% (66% in 2003) of employers surveyed reported that information requests should be handled the same day.

➢ In 2004, 98% (98% in 2003) of all employers surveyed reported that information received from PERSI was *Useful* (either somewhat of mostly).

➢ In 2004, 95% of employers surveyed reported that they were *Satisfied* (either somewhat or extremely) with the accuracy of the information they received regarding their request (98% in 2003).

➢ The largest responses for additional services or changes that employers would like to see were improving transmittal/electronic filing procedures.

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Introduction

Background

The Public Employee Retirement System of Idaho (PERSI) provides retirement and other benefits to over 100,000 public employee members statewide. PERSI works with over 660 employers to provide these benefits and services to active members. PERSI seeks to develop a comprehensive model of customer service satisfaction for both employers and members and, as part of that effort, desire to elicit feedback from stakeholder groups about PERSI policies and procedures.

Study Purpose

To better understand the perceptions and experiences of employers and provide better service to them, PERSI and Clearwater Research, Inc., developed a customer satisfaction survey instrument to elicit attitudes and perceptions of payroll professionals who work with PERSI from the following topic areas:

- ➤ Satisfaction with PERSI,
- ➤ PERSI transmittal report processes,
- ➤ Requests to PERSI for information, and
- ➤ Attitudes about and perceptions of PERSI.

Organization of Report

The report begins with a brief description of the research methods employed in this project, including sampling plan, questionnaire design, and procedures for data collection, preparation, and analysis. The findings of the analyses are presented in the order of appearance in the questionnaire, with each followed by an immediate discussion of the results.

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Method

Survey Instrument

Clearwater Research collaborated extensively with PERSI staff to design the Employer Survey questionnaire. The instrument contained items on transmittal report experiences, experience with information or support requests, general attitude questions, and overall satisfaction. The questionnaire instrument was developed for payroll specialists of PERSI employers, and design elements were specifically incorporated for administration using computer-assisted telephone interviewing (CATI). The average length of the interview was 9.3 minutes. The survey was offered in English only.

Sampling

For this research effort, the employer population was composed of PERSI employers. An electronic file of 678 employers and associated contact information was provided by PERSI. Multiple listings of different organizations with the same contact information (i.e., duplicate contacts) were removed before fielding. The original, de-duplicated sample file contained a total of 632 unique sample records (i.e., employers).

A census of the 632 employers and a total of 527 surveys were completed (response rate = 83%).

When attempting a census of the entire population, it is critical that surveys are completed with as many members of the population as possible. In order to assess the quality of the results it is necessary to compare the results to the population along key characteristics of the population. The distribution of agency type was compared between the original sample file and the data file of completed interviews. No substantial differences were visibly evident nor statistically detectable, so case weighting by agency type was not warranted for these data. The distribution of agency type by the employer population (i.e., original sample file) and the obtained sample (i.e., completed interviews) is shown in Table 1.

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TABLE 1: Distribution of Agency Type by Population and Obtained Sample

	Employer Population		Obtained Sample	
	Count	Percent	Count	Percent
City	142	22%	119	23%
County	40	6%	37	7%
Other	226	36%	183	35%
School District	131	21%	114	22%
State Agency	93	15%	74	14%
Total	632		527	

Data Collection

Clearwater Research collected data for the 2004 Employer Survey from September 29, 2004 to November 5, 2004. Interviewers were thoroughly briefed prior to data collection, and they rehearsed the questionnaire before conducting actual interviews. Additionally, monitoring staff listened to a sampling of interviews throughout the field period to maintain data quality.

Each sample record was resolved by attempting it a minimum of eight times during the calling period or until a final disposition code (such as "completed interview" or "disconnected/ nonworking number") was assigned. The calling hours for the project were primarily weekday business hours (8:30 AM to 4:30 PM), adjusted accordingly for time zones.

At the close of the field period, each sampled telephone number was assigned a final disposition that summarized the separate outcomes of each call attempt for that number. The final dispositions for the 2004 Employer Survey sample are presented in Table 2. A total of 527 interviews were completed during the specified field periods.

TABLE 2: Final Dispositions

Description	Count
No Answer	6
Busy	3
Answering Machine	26
Hang up before any information	3
Callback	8
Final Refusal - Has been selected	15
Disconnect/Non-working #	3
Not A business	3
No Eligible Respondent at this	8
No Eligible Respondent during	25
Final Term in Questionnaire	2
Wrong Number	3
Complete	527
Total	632

Data Preparation

Survey data were entered and automatically consolidated into a CATI database as the interviews were being conducted. Prior to analysis, Clearwater Research followed a comprehensive routine of data preparation. Data were converted from the CATI database and formatted for review and analysis in SPSS, a statistical analysis software package. Prior to analysis, the original survey variables and response categories were labeled, and additional variables were created for the analysis as needed. In addition, open-ended responses were examined and cleaned for overall comprehension.

Coding

Clearwater Research has developed a standard set of procedures to prepare data for review and analysis. First, each variable was provided a unique label matching the CATI question number from the survey instrument. Next, each raw, labeled variable was recoded into a new variable to remove non-responsive answers (e.g., Don't Know, Refused). These recoded variables were designated using an alphabetical subscript that identifies the resultant measurement scale.

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Data Analysis

The analysis plan consisted of two phases. First, an initial analysis of the distributions of individual items and of bivariate associations among demographic and substantive items was conducted. From the basic analysis, additional research questions with expanded scope and complexity were developed and explored.

Clearwater Research used SPSS to analyze the data. The initial analyses involved frequency tables and descriptive statistics (e.g., mean, standard deviation) to examine and characterize the distribution of responses for each variable. These descriptive statistics also guided the subsequent analyses.

The next step in the analysis examined the pattern of relations between variables to identify meaningful similarities and dissimilarities among the data. Chi-square tests were primarily used to explore differences in response patterns and outcomes across salient demographic and geographic variables.

Findings and Interpretation

The results of the analysis are presented in the following order:

1 Overall Satisfaction with PERSI
2 Experience with PERSI Transmittal reports
3 Experience with Annual Audit
4 Experience with Information or Support Requests

On the following pages, charts, tables, and descriptions of survey results include the question numbers for easy reference. For the full text of the questions and response categories, please refer to Appendix A.

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Respondent Characteristics

The following section describes the characteristics of the 527 respondents who participated in the 2004 Employer Survey.

TABLE 3: Summary Characteristics of All Survey Respondents

Characteristics	Percent
Agency Type	
City	23%
County	7%
Other	35%
School District	22%
State Agency	14%
Size of Organization (# *employees*)	
< 50	67%
50 to 149	18%
150 to 499	11%
500 +	4%

Characteristics Summary

Slightly more than one-third of respondents were from organizations grouped as *Other* (35%). *City agencies* and *School districts* each accounted for slightly less than one-quarter of the respondent pool (23% and 22%, respectively). Moreover, two-thirds of all respondents worked in organizations that had fewer than fifty employees (67%).

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Past Participation in PERSI Survey

Participation in 2003 PERSI Employer Survey (Q006)

Q006: Did you participate in the PERSI employer telephone survey regarding the transmittal process and reporting activities last year?

FIGURE 1: Participation in 2003 Employer Survey (Q006)

60% of respondents participated in the 2003 employer survey.
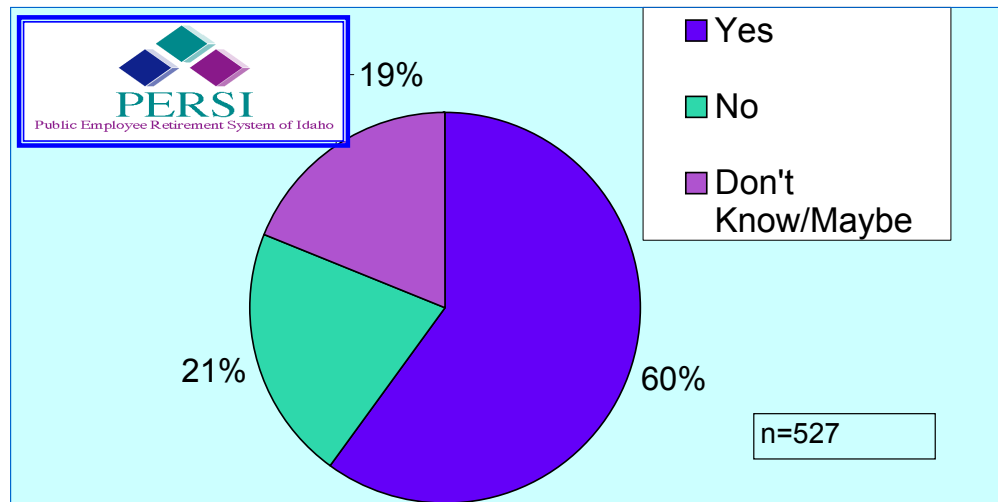
- All respondents were asked Q006, and a total of 527 answers were collected (See Figure 1).

- A majority of respondents (60%) to the 2004 Employer Survey had participated in the 2003 Employer Surveys. Just over 21% did not participate in the 2003 Employer surveys, while another 19% were not sure.

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Overall Satisfaction

This section focuses on overall satisfaction with PERSI. Survey variable Q010 was used to assess overall satisfaction.

Overall Satisfaction with PERSI (Q010)

Q010: Consider your experiences with PERSI in the past year. How satisfied or dissatisfied overall are you with PERSI?

FIGURE 2: Overall Satisfaction with PERSI (Q010)

94% of respondents were satisfied with PERSI in 2004, this was the same percentage as in 2003.
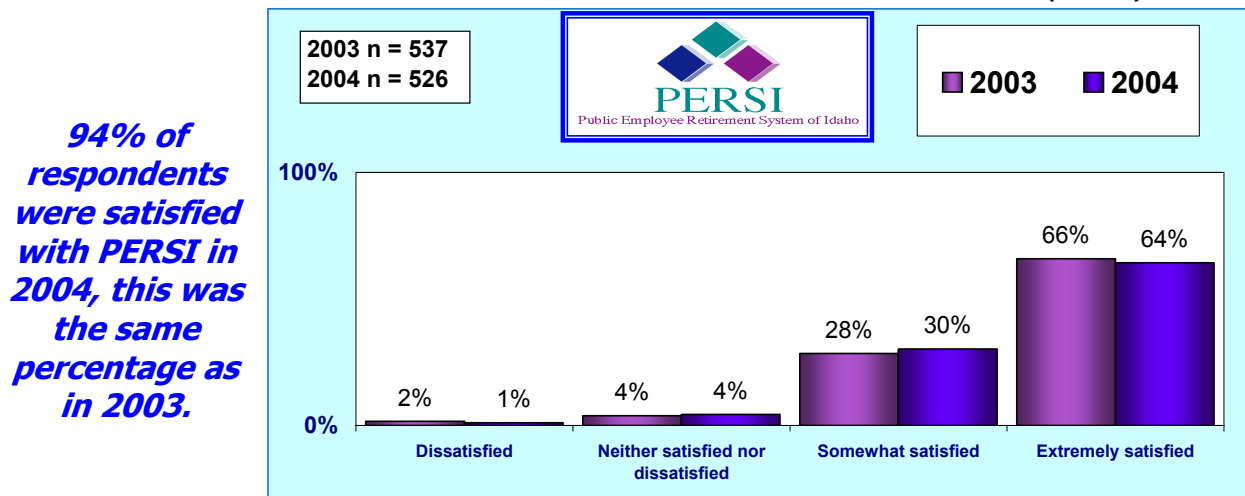
- All employers in the sample were asked Q010, and a total of 526 answers were collected (See Figure 2).

- Respondents were asked to select one of the following five categories: *Extremely Satisfied, Somewhat Satisfied, Neither Satisfied nor Dissatisfied, Somewhat Dissatisfied,* and *Extremely Dissatisfied.* Because of low frequency responses, the two *dissatisfied* response categories (*Somewhat* and *Extremely Dissatisfied*) were combined into a single category for reporting and analysis purposes.

- Overall, 64% of employers were *Extremely satisfied (*n = 338)*, 30% of employers were *Somewhat satisfied* (n = 159), 4% of employers were *Neither satisfied nor dissatisfied* (n = 23), and 1% of employers were *Dissatisfied* with PERSI overall (n = 6).

- The percentages in each category are nearly identical to the 2003 results.

FIGURE 3: Overall Satisfaction with PERSI by Agency Type (Q010)
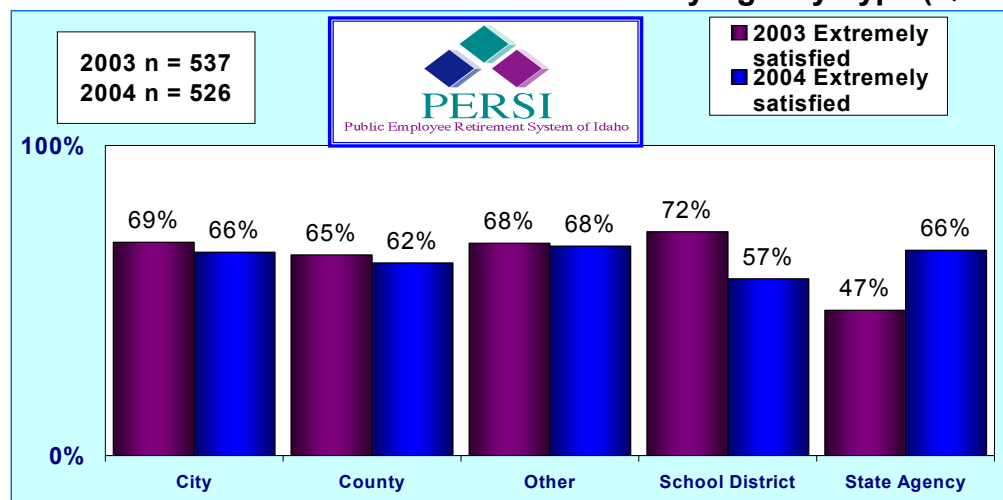
2003 n = 537
2004 n = 526

Legend:
■ 2003 Extremely satisfied
■ 2004 Extremely satisfied

	City	County	Other	School District	State Agency
2003	69%	65%	68%	72%	47%
2004	66%	62%	68%	57%	66%

A larger percentage of state agencies reported that they were extremely satisfied with PERSI in 2004 than in 2003.

- *AGENCY TYPE:* In 2004, there was no significant difference between agencies with regard to overall satisfaction with PERSI. There was an increase in the percentage of state agencies who reported that they were extremely satisfied with PERSI between 2003 and 2004. A smaller percentage of school districts reported that they were extremely satisfied with PERSI in 2004 than in 2003.

FIGURE 4: Overall Satisfaction with PERSI by Agency Size (Q010)
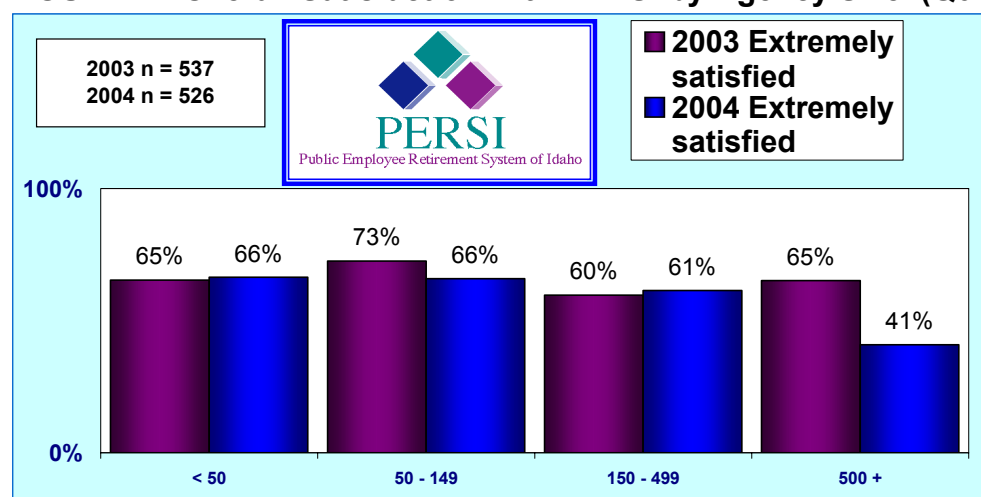
2003 n = 537
2004 n = 526

Legend:
■ 2003 Extremely satisfied
■ 2004 Extremely satisfied

	< 50	50 - 149	150 - 499	500 +
2003	65%	73%	60%	65%
2004	66%	66%	61%	41%

A smaller percentage of agencies with 500 or more employees reported that they were extremely satisfied with PERSI overall.

- *AGENCY SIZE:* In 2004, a smaller percentage of agencies with 500 or more employees reported that they were extremely satisfied with PERSI overall. These agencies also had a dramatic decrease in the percentage reporting that they were extremely satisfied between 2003 and 2004.

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Transmittal Report Processes

This section focuses on questions that explored experience with transmittal report process. Survey variables include Q015, Q020, Q025, Q026, Q030, and Q040.

Satisfaction with the current transmittal reporting process (Q015)

Q015: How satisfied or dissatisfied are you with the current transmittal reporting process?

FIGURE 5: Satisfaction with Transmittal Reporting (Q015)

90% of all employers surveyed were Satisfied with the transmittal process. This was slightly less than in 2003.

2003 n = 499
2004 n = 486

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■ 2003   ■ 2004
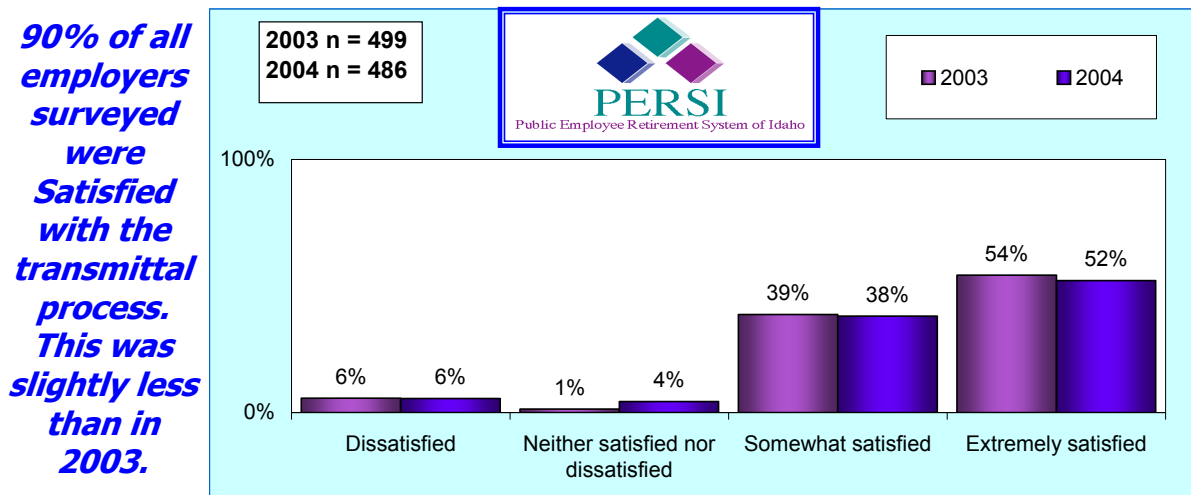
- All respondents were asked Q015, and a total of 486 answers were collected (See Figure 1).

- Respondents were asked to select from one of the following five categories: *Extremely Satisfied, Somewhat Satisfied, Neither Satisfied nor Dssatisfied, Somewhat Dissatisfied,* and *Extremely Dissatisfied.* Because of low frequency responses, the two *dissatisfied* response categories (*Somewhat* and *Extremely Dissatisfied*) were combined into a single category for reporting and analysis purposes.

- Overall, 52% of employers were *Extremely Satisfied (*n = 253)*, 38% of employers were *Somewhat Satisfied* (n = 185), 4% of employers were *Neither Satisfied nor Dissatisfied* (n = 21), and 6% of employers were *Dissatisfied* with the retirement benefits currently provided to members (n = 27).

- In 2004, 3% more respondents selected *Neither Satisfied nor Dissatisfied* indicating a possible weakening in satisfaction with the transmittal reporting process.

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FIGURE 6: Satisfaction with Transmittal Reporting by Agency Type (Q015)

2003 n = 499
2004 n = 486

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■ 2003 Extremely satisfied
■ 2004 Extremely satisfied
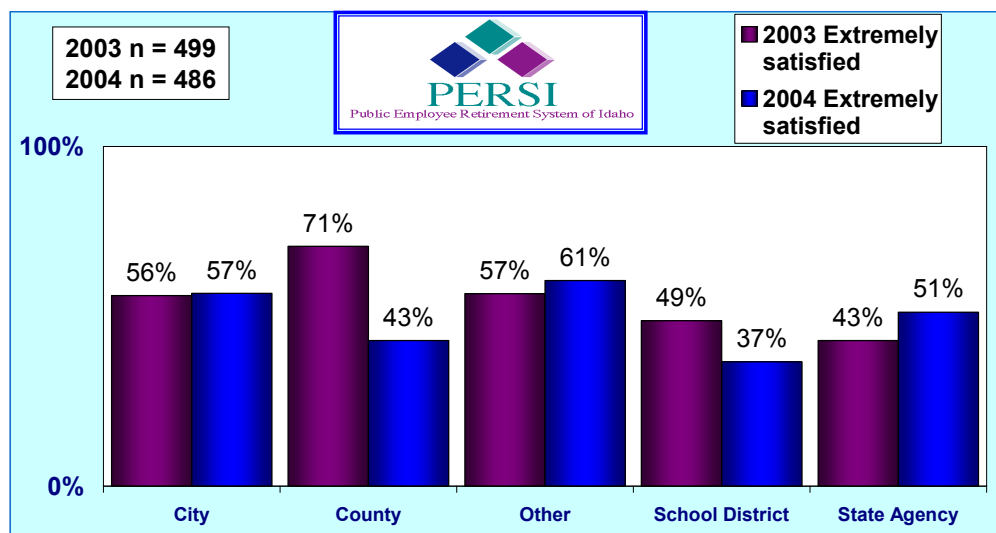
In 2004, school districts were the least likely to be extremely satisfied with transmittal reporting.

100%

56% 57% 71% 43% 57% 61% 49% 37% 43% 51%

0%

City   County   Other   School District   State Agency

- *AGENCY TYPE:* School districts were the agency type least likely to be very satisfied with PERSI's transmittal reporting in 2004. City and other agencies were the most likely to be very satisfied with transmittal reporting. County employers showed the largest decrease in satisfaction between 2003 and 2004.

FIGURE 7: Satisfaction with Transmittal Reporting by Agency Size (Q015)

2003 n = 499
2004 n = 479

PERSI
Public Employee Retirement System of Idaho

■ 2003 Extremely satisfied
■ 2004 Extremely satisfied
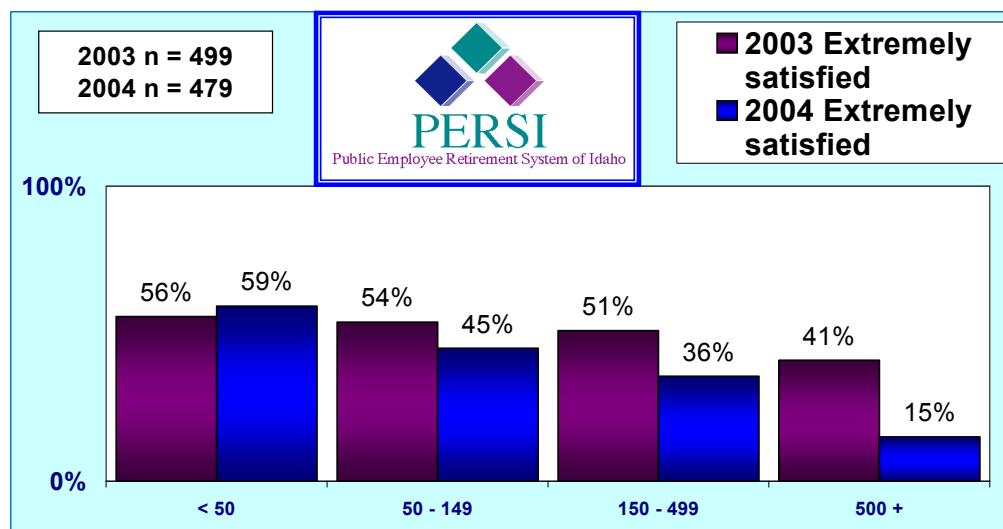
Larger agencies were less likely to be extremely satisfied with transmittal reporting

100%

56% 59% 54% 45% 51% 36% 41% 15%

0%

< 50   50 - 149   150 - 499   500 +

- *AGENCY SIZE:* Larger organizations were less likely to be very satisfied with transmittal reporting. In 2004, 15% of agencies with more than 500 employees reported that they were very satisfied with transmittal reporting compared to 59% of agencies with less than 50 employees. In fact, the slight relationship between satisfaction and agency size in 2003 was exacerbated in 2004 resulting in a clear negative relationship between satisfaction and size.

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Q020: How easy is it to submit your transmittal reports to PERSI?

FIGURE 8: Ease of Submitting Transmittal Reports (Q020)

94% of all employers said reports were easy to submit, the same percentage as in 2003.
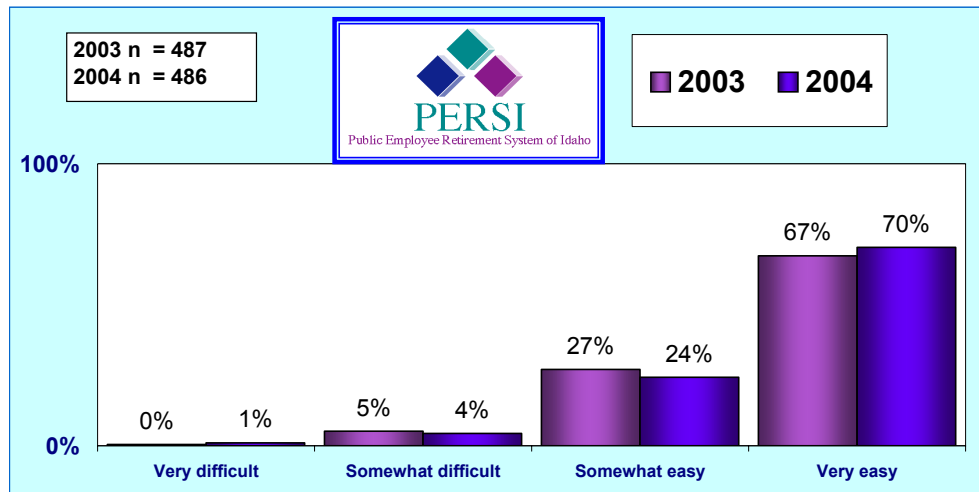
- All employers in the sample were asked Q020, and a total of 486 answers were collected (See Figure 3).

- Respondents were asked to select from one of the following four categories: *Very Easy, Somewhat Easy, Somewhat Difficult* and *Very Difficult.*

- Overall, 70% of employers considered transmittal reports *Very Easy* to submit *(*n = 342)*,* 24% of employers considered *Somewhat Easy* (n = 118), 4% of employers considered *Somewhat Difficult* (n = 21), and 1% of employers considered transmittal reports were *Very Difficult* to submit (n = 5).

- There was a 3% increase in the percent of employers who answered *Very Easy* in 2004, however, there was also a 1% increase in those who answered *Very Difficult.*

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FIGURE 9: Ease of Submitting Transmittal Reports by Agency Type (Q020)

2003 n = 487
2004 n = 486

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■ 2003Very easy
■ 2004 Very easy

100%

88%
78%
76%
72%
71%
69%
68%
63% 63%
61%

0%

City   County   Other   School District   State Agency

City and state agencies were the most likely to report that submitting transmittal reports was very easy.
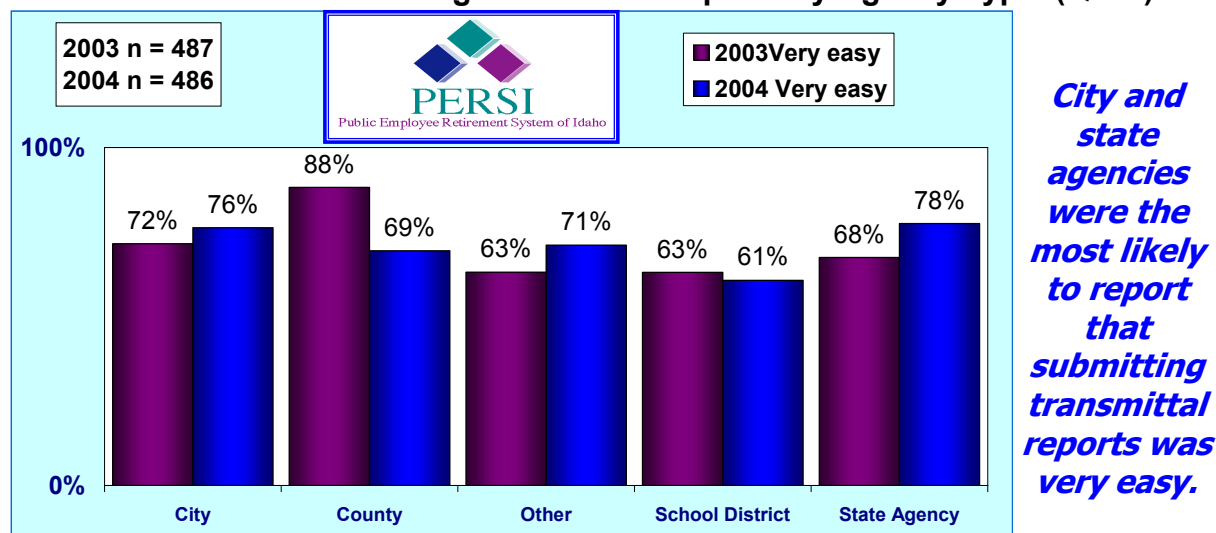
- *AGENCY TYPE:* City and state agencies were the most likely to report that submitting transmittal reports was *Very Easy*. The percentage of counties reporting that submitting transmittal reports was *Very Easy* decreased from 88% in 2003 to 69% in 2004.

FIGURE 10: Ease of Submitting Transmittal Reports by Agency Size (Q020)

2003 n = 487
2004 n = 486

PERSI
Public Employee Retirement System of Idaho

■ 2003 very easy
■ 2004 very easy

100%

78%
72%
71%
70%
67%
66%
60%
55%

0%

< 50   50 - 149   150 - 499   500 +

Agencies with 500 or more employees were the least likely to report that submitting transmittal reports was very easy.
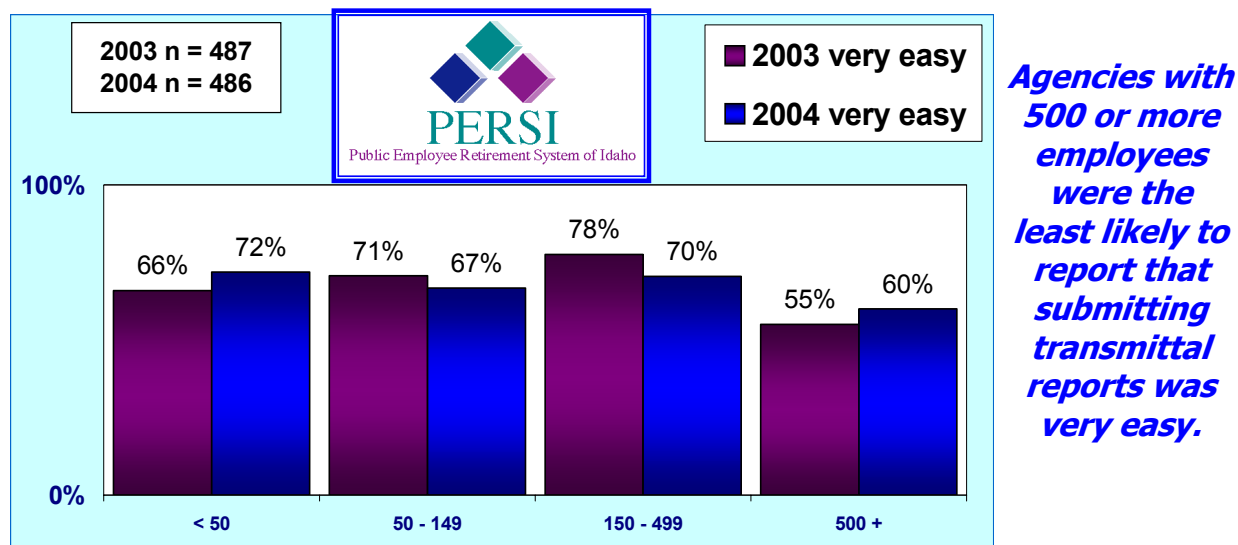
- *AGENCY SIZE:* Agencies with 500 or more employees were the least likely to report that submitting transmittal reports was *Very Easy*. The percentage of agencies with less than 50 employees and those with more than 500 employees reporting that submitting transmittal reports was *Very Easy* increased between 2003 and 2004 while

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the percentage of agencies with between 50 and 499 employees reporting that submitting transmittal reports was *Very Easy* decreased between 2003 and 2004.

Q026: Last year <the person who responded to the survey> indicated problems with submitting transmittal reports to PERSI. Were those problems resolved?

FIGURE 11: Resolution of Past Problems with Transmittal (Q026)

Most employers reported that last year's problems had been resolved.
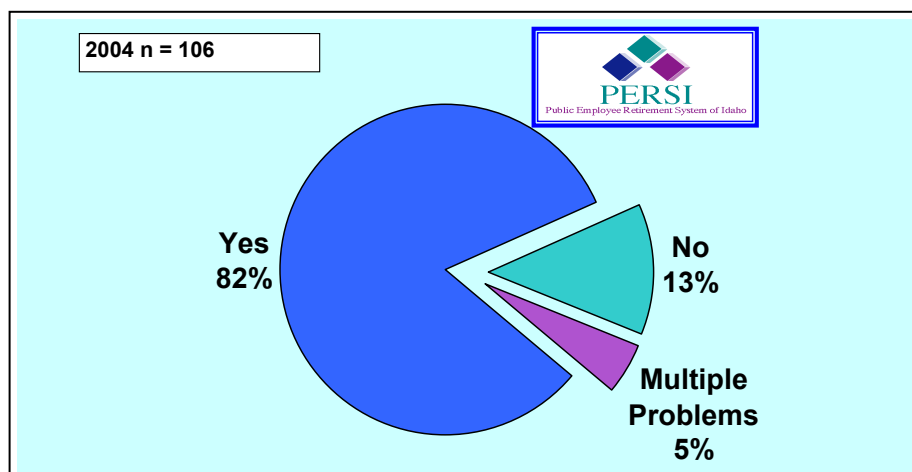
- Employers who indicated that they had problems with the transmittal reporting process during the 2003 survey were asked Q026, and a total of 111 answers were collected (See Figure 3).

- Respondents were asked to select from one of the following three categories: *Yes, No,* and *Multiple Problems, Only Some Resolved.*

- Overall, 82% of employers reported that their problems had been resolved *(n = 92)*, 13% of employers reported that their problems had not been resolved (n = 14), and 5% of employers reported that they had multiple problems, some of which were resolved (n =5).

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Experienced Problems with Transmittal Reports (Q030)

Q030: In the past twelve months, have you had any problems submitting transmittal reports to PERSI?

FIGURE 12: Experienced Problems with Transmittal Reports (Q030)

27% of all employers surveyed experience problems with transmittal reports, slightly less than in 2003.

2003 n = 492
2004 n = 486

2003 **2004**

100%

No: 71%, 73%

Yes: 29%, 27%

0%

No   Yes
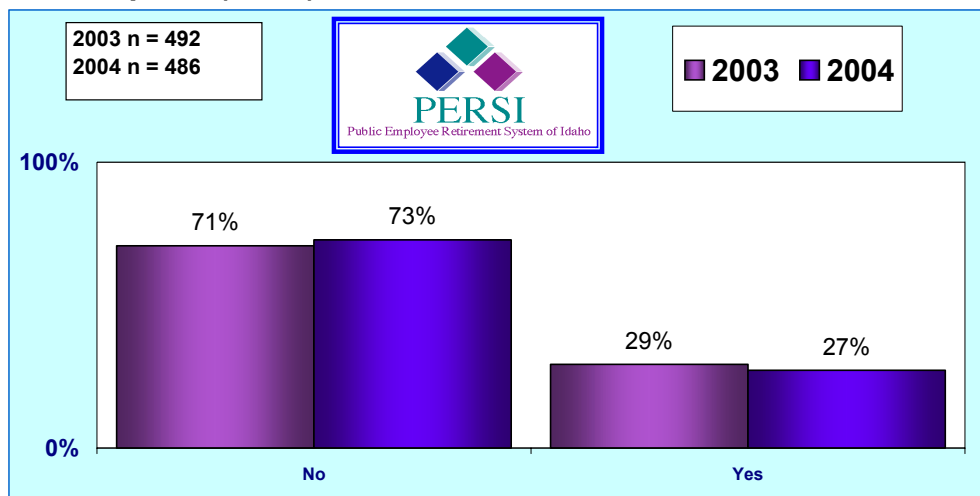
- All employers in the sample were asked Q030, and a total of 486 answers were collected (See Figure 5).

- Overall, 27% of employers experienced problems with transmittal reports *(n = 132).*

- Responses for Q026 in 2004 indicate that there have been small reductions in problems submitting transmittal reports since 2003.

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FIGURE 13: Experienced Problems with Reports by Agency Type (Q030)
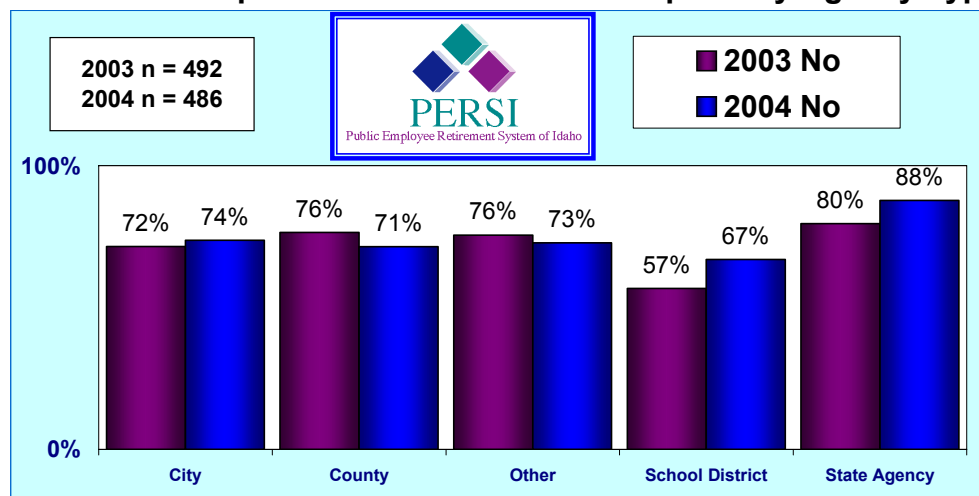
2003 n = 492
2004 n = 486

PERSI
Public Employee Retirement System of Idaho

■ 2003 No
■ 2004 No

100%

72% 74%   76% 71%   76% 73%   57% 67%   80% 88%

0%

City   County   Other   School District   State Agency

A smaller percentage of School Districts reported that they had not experienced any problems submitting transmittal reports.

- *AGENCY TYPE:* A larger percentage of state agencies reported that they had not experienced problems submitting transmittal reports during the previous 12 months than other agencies. A smaller percentage of school districts reported that they had not experienced any problems. Both state agencies and school districts reported fewer problems than in 2003.

FIGURE 14: Experienced Problems with Reports by Agency Type (Q030)
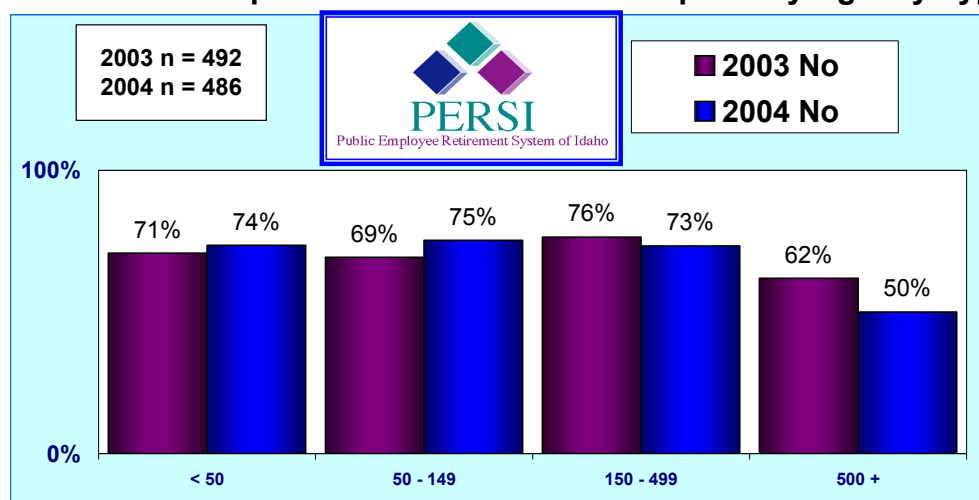
2003 n = 492
2004 n = 486

PERSI
Public Employee Retirement System of Idaho

■ 2003 No
■ 2004 No

100%

71% 74%   69% 75%   76% 73%   62% 50%

0%

< 50   50 - 149   150 - 499   500 +

A smaller percentage of agencies with 500 or more employees reported that they did not experience any problems submitting transmittal reports.

- *AGENCY SIZE:* A smaller percentage of agencies with 500 or more employees reported that they did not experience any problems submitting transmittal reports during the previous 12 months than other agencies. A smaller percentage of these agencies reported that they did not experience any problems in 2004 than in 2003.

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Q040: Who do you usually contact first when you encounter a problem submitting your organization's transmittal reports to PERSI?

FIGURE 15: Problem Solving Contacts (Q040)

65% of all employers contacted a PERSI technical representative when encountering transmittal report problems.
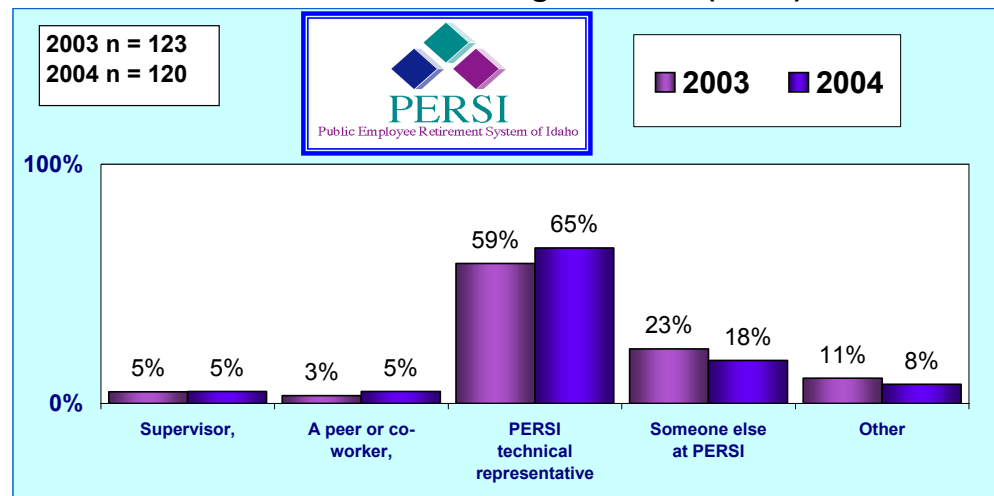
- Employers who answered *Yes* to Q065 were asked Q040, and a total of 132 answers were collected (See Figure 7).

- Respondents were asked to select from one of the following six categories: *Supervisor, Peer or co-worker, PERSI technical representative, Someone else at PERSI,* and *Other.*

- Overall, 65% of employers responded *PERSI technical representative* (n = 78), 23% of employers responded *Someone else at PERSI* (n = 21), 5% of employers responded *Supervisor (*n = 6)*,* 5% of employers responded *Peer or co-worker* (n = 6), and 8% of employers responded *Other* (n = 9).

- A larger percentage of respondents reported that they contacted a PERSI technical representative in 2004 than in 2003.

- Responses coded as *Other* are included in Appendix B.

FIGURE 16: Problem Solving Contacts by Agency Type (Q040)

2003 n = 123
2004 n = 120

■ 2003 PERSI Tech
■ 2004 PERSI Tech

	City	County	Other	School District	State Agency
2003	74%	67%	59%	44%	67%
2004	72%	78%	57%	66%	60%
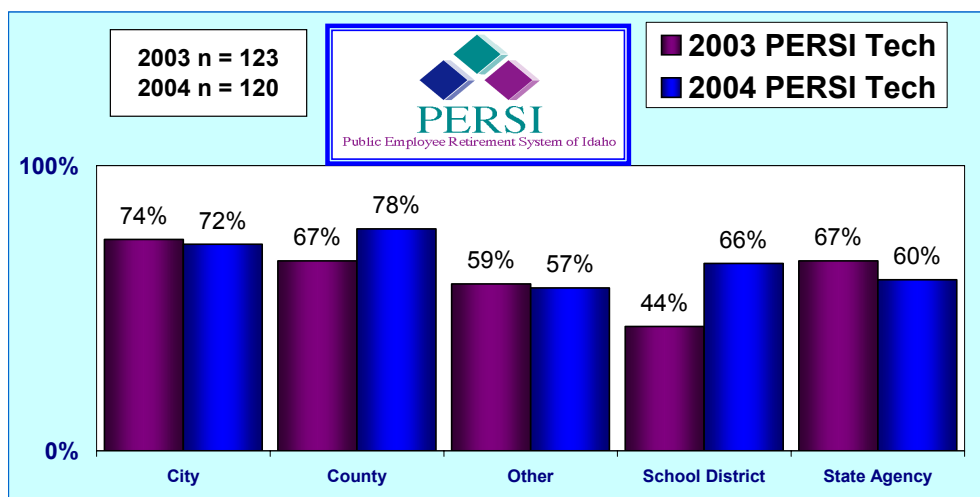
A larger percentage of county agencies contacted a PERSI technical representative with problems submitting transmittal reports.

- **AGENCY TYPE:** A larger percentage of county agencies reported that they contacted a PERSI technical representative when they had a problem submitting transmittal reports than other agencies. Between 2003 and 2004, county agencies and school districts had the largest increase in the percentage of respondents contacting a technical representative.

FIGURE 17: Problem Solving Contacts by Agency Size (Q040)

2003 n = 123
2004 n = 120

■ 2003 PERSI Tech
■ 2004 PERSI Tech

	< 50	50 - 149	150 - 499	500 +
2003	64%	42%	60%	38%
2004	70%	75%	50%	13%
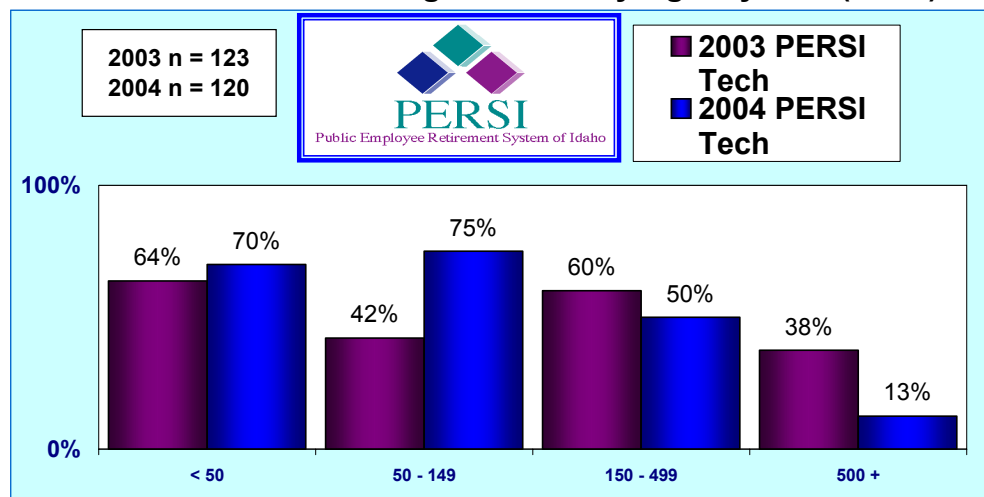
A smaller percentage of agencies with 500 or more employees contacted a PERSI technical representative when they had a problem with transmittal reports.

- **AGENCY SIZE:** A larger percentage of agencies with 500 or more employees reported that they contacted a PERSI technical representative when they had a problem submitting a transmittal reports than other agencies. Agencies with between 55 and 149 employees showed an increase in the percentage contacting a PERSI technical representative between 2003 and 2004 while agencies with 500 or more employees showed a decrease in the percentage contacting a PERSI technical representative between 2003 and 2004.

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Annual Audit Processes

This section focuses on questions that explored experience with PERSI's annual audit process. Survey variables include Q045, Q050, and Q055.

Satisfaction with PERSI's annual audit process (Q045)

Q045: How satisfied or dissatisfied are you with the PERSI annual audit process?

FIGURE 18: Problem Solving Contacts (Q045)

67% of respondents reported that they were extremely satisfied with PERSI's annual audit process.
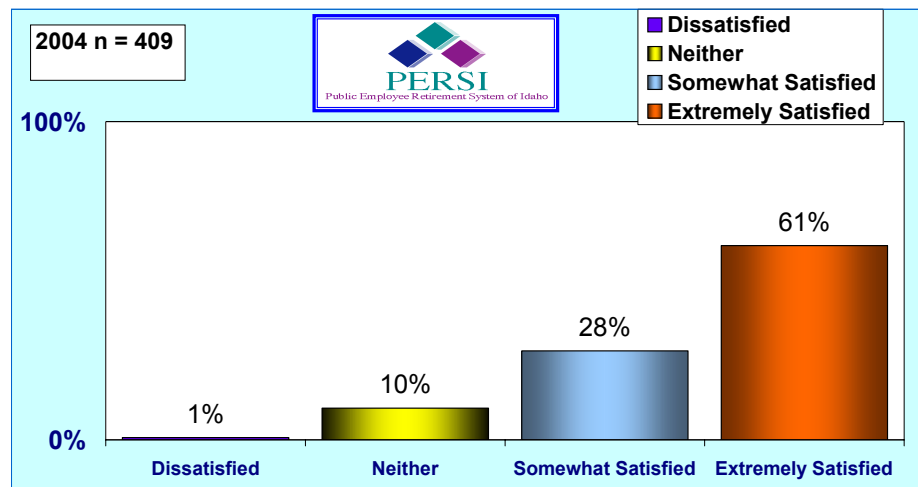
- All employers were asked Q045, and a total of 409 answers were collected (see Figure 18).

- Respondents were asked to select from one of the following four categories: *Dissatisfied, Neither Satisfied or Dissatisfied, Somewhat Satisfied,* and *Extremely Satisfied.*

- Overall, 61% of employers reported that they were *Extremely Satisfied* (n = 248), 28% reported that they were *Somewhat Satisfied* (n = 116), 10% reported that they were *Neither Satisfied or Dissatisfied (*n = 42)*,* and 1% reported that they were *Dissatisfied* (n = 3).

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FIGURE 19: Satisfaction with Annual Audit Process Q045 By Agency Type
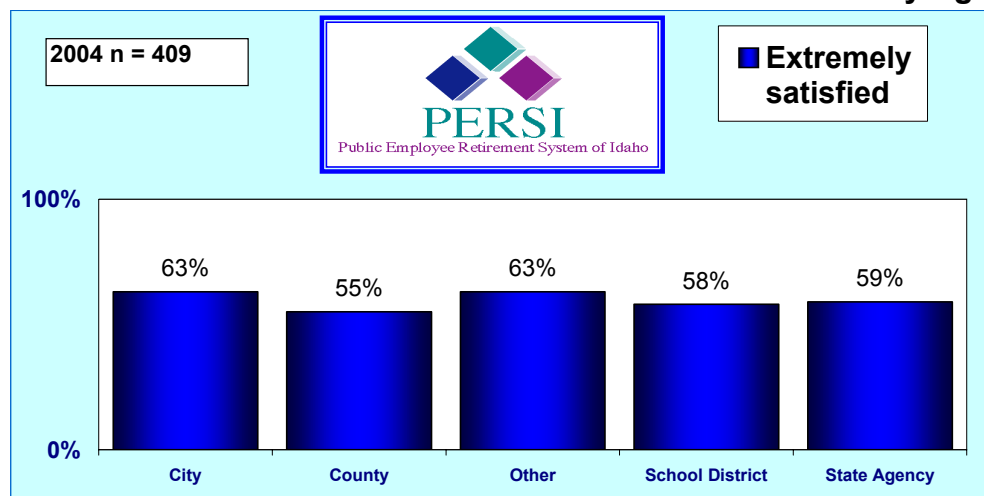
2004 n = 409

Extremely satisfied

| City | County | Other | School District | State Agency |
| 63% | 55% | 63% | 58% | 59% |

There was no significant difference in satisfaction with PERSI's annual audit process by agency type.

- *AGENCY TYPE:* There was no significant difference in satisfaction with PERSI's annual audit process by agency type.

FIGURE 20: Satisfaction with Annual Audit Process Q045 By Agency Size
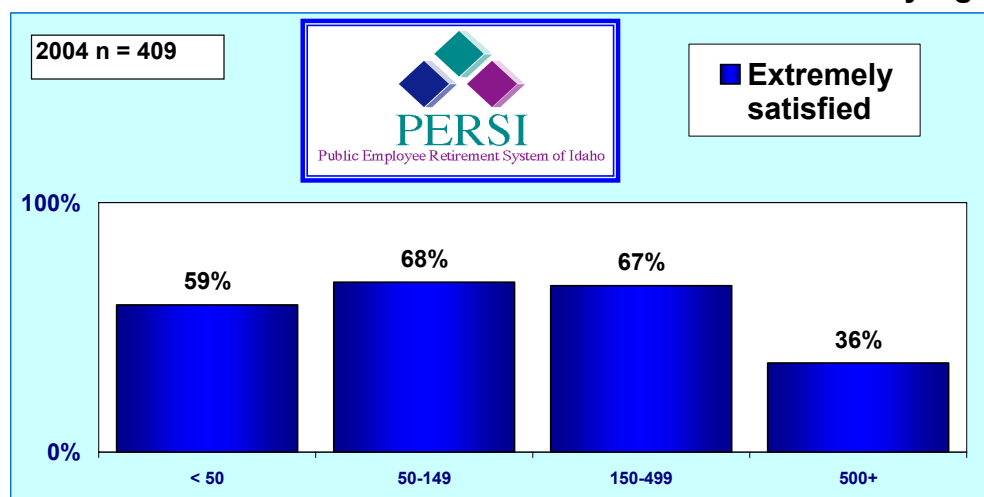
2004 n = 409

Extremely satisfied

| < 50 | 50-149 | 150-499 | 500+ |
| 59% | 68% | 67% | 36% |

A smaller percentage of agencies with 500 or more employees reported that they were extremely satisfied with PERSI's annual audit process.

- *AGENCY SIZE:* A smaller percentage of agencies with 500 or more employees reported that they were extremely satisfied with PERSI's annual audit process than other agencies.

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Q050: How easy is it to participate in the annual audit?

FIGURE 21: Ease of Participation (Q050)

Most respondents reported that it was very easy to participate in PERSI's annual audit process.
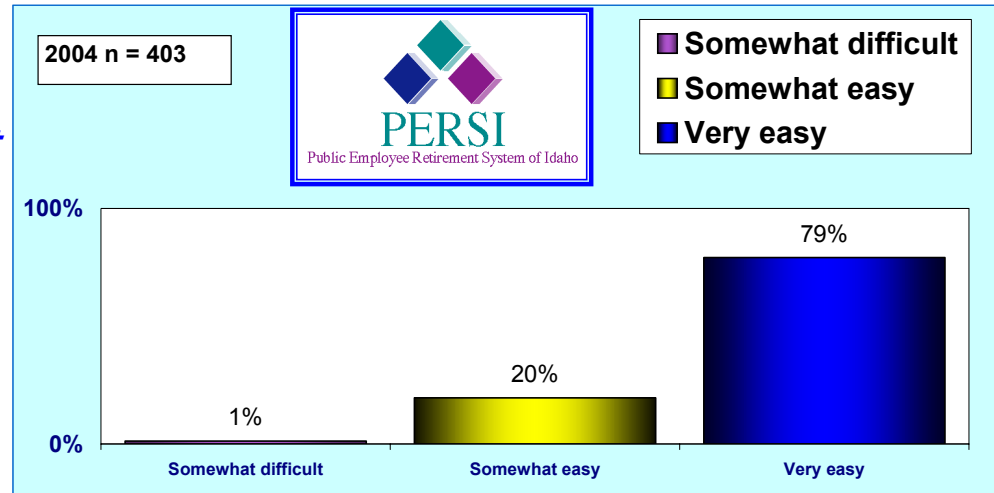
- Employers who answered Q045 were asked Q050, and a total of 403 answers were collected (see Figure 21).

- Respondents were asked to select from one of the following four categories: *Very Easy, Somewhat Easy, Somewhat Difficult,* or *Very Difficult.*

- Most respondents reported that it was *Very Easy* to participate in PERSI's annual audit (n = 319), 20% reported that it was *Somewhat Easy* (n = 79), and 1% reported that it was *Somewhat Difficult* (n = 5). No respondents reported that is was V*ery Difficult* to participate in PERSI's annual audit process.

FIGURE 22: Ease of Participation by Agency Type (Q050)
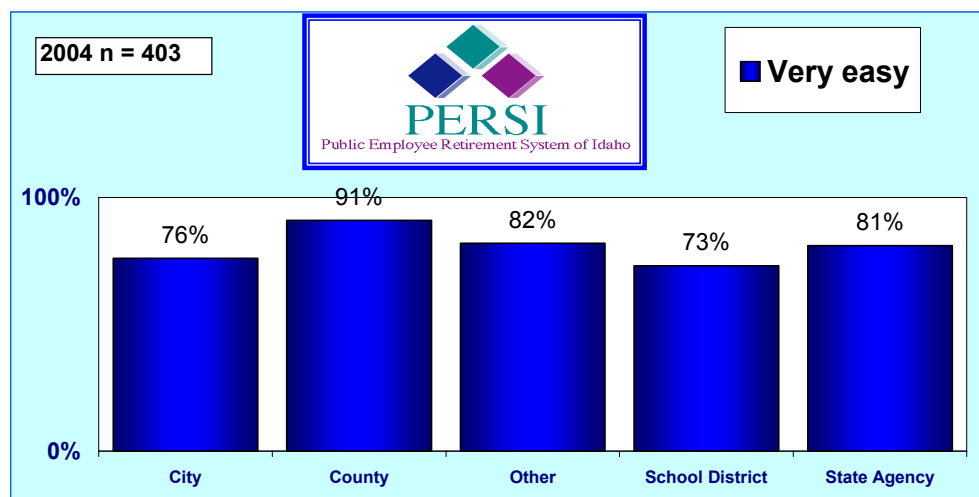
2004 n = 403

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■ Very easy

City	County	Other	School District	State Agency
76%	91%	82%	73%	81%

A larger percentage of counties reported that it was very easy to participate in PERSI's annual audit process.

- **AGENCY TYPE:** A larger percentage of counties reported that it was Very Easy to participate in PERSI's annual audit process than other agencies. School districts had the smaller percentage of employers reporting that the process was Very Easy.

FIGURE 23: Ease of Participation by Agency Size (Q050)
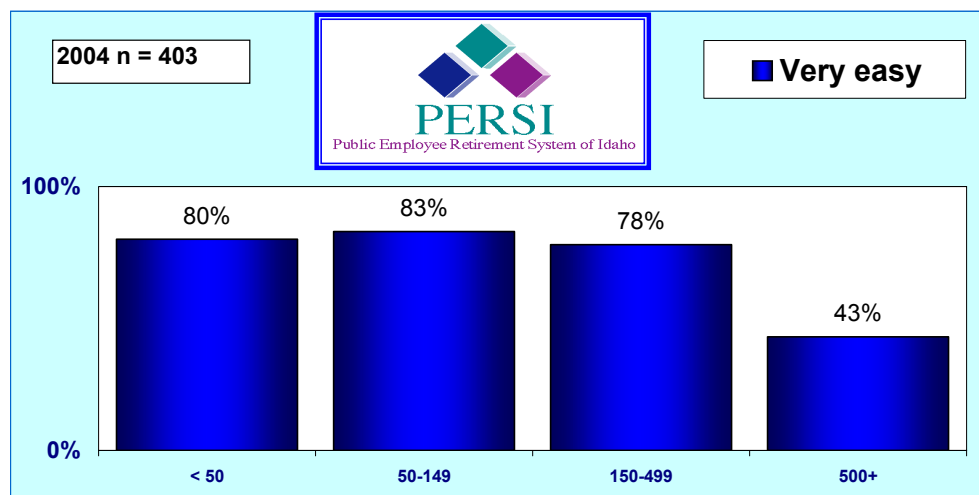
2004 n = 403

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■ Very easy

< 50	50-149	150-499	500+
80%	83%	78%	43%

A smaller percentage of agencies with 500 or more employees reported that it was very easy to participate in PERSI's annual audit.

- **AGENCY SIZE:** A smaller percentage of agencies with 500 or more employees reported that it was Very Easy to participate in PERSI's annual audit.

Q060: Which of the following best describes the overall usefulness of the annual audit process?

FIGURE 24: Overall Usefulness of Audit Process (Q060)

Nearly half of respondents reported that PERSI's annual audit process was somewhat useful.
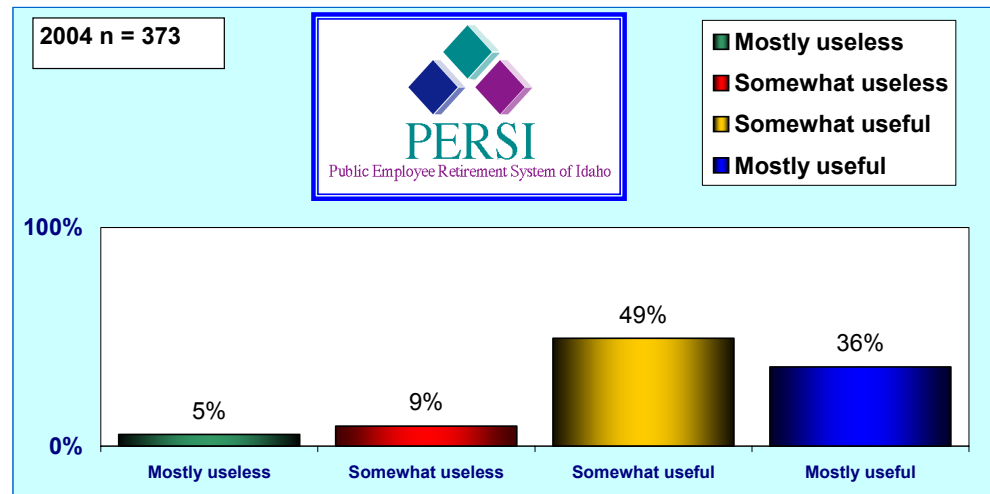
- All employers in the sample were asked Q065, and a total of 521 were collected (See Figure 9).

- Respondents were asked to select on of the following four categories: *Mostly Useful, Somewhat Useful, Somewhat Useless,* and *Mostly Useless*.

- 36% of all respondents reported that the process was *Mostly Useful* (n = 135), 49% reported that it was *Somewhat Useful* (n = 184), 9% reported that it was *Somewhat Useless* (n = 34), and 5% reported that it was *Mostly Useless* (n = 20).

FIGURE 25: Usefulness of Audit Process by Agency Type (Q060)

2004 n = 373

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■ Useful

100%

89% 96% 81% 80% 92%

0%

City   County   Other   School District   State Agency
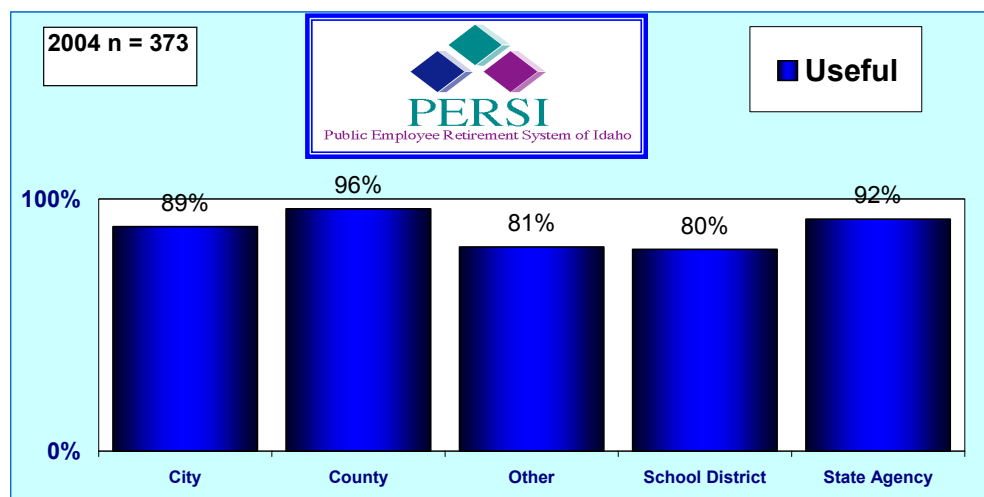
Nearly all county agencies reported that PERSI's audit process was useful

- *AGENCY TYPE:* Nearly all county agencies reported that the audit process was useful. A smaller percentage of school districts reported that the process was useful than other agencies.

FIGURE 26: Usefulness of Audit Process by Agency Size (Q060)
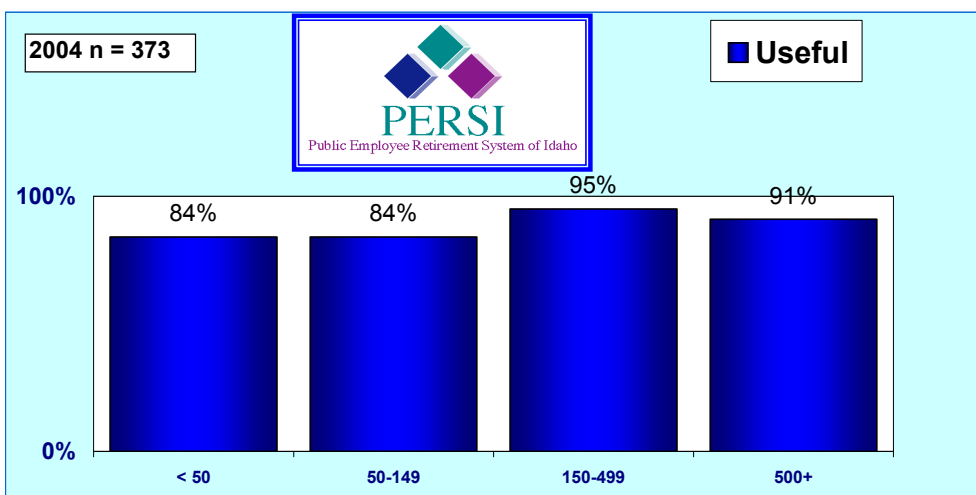
2004 n = 373

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■ Useful

100%

84% 84% 95% 91%

0%

< 50   50-149   150-499   500+

Nearly all agencies with between 150 and 499 employees reported that the audit process was useful.

- *AGENCY SIZE:* Nearly all agencies with between 150 and 499 employees reported that the audit process was useful.

Information or Support Requests Experience

This section focuses on experiences related to requests for information or support. Survey variables include Q065, Q070, Q075, Q080, Q085, Q090, Q095, Q100, Q105, and Q110.

Information Request (Q065)

Q065: In the past twelve months, how many times have you had made an information or service request of PERSI?

80% of all employers made an information or service request in 2003. This was an increase from 73% in 2003. 55% made 3 or more requests.

FIGURE 27: Information Request (Q065)

2003 n = 523
2004 n = 521

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■ 2003 ■ 2004

	0	1 or 2	3 to 5	6 or more
2003	27%	32%	27%	15%
2004	20%	34%	23%	22%
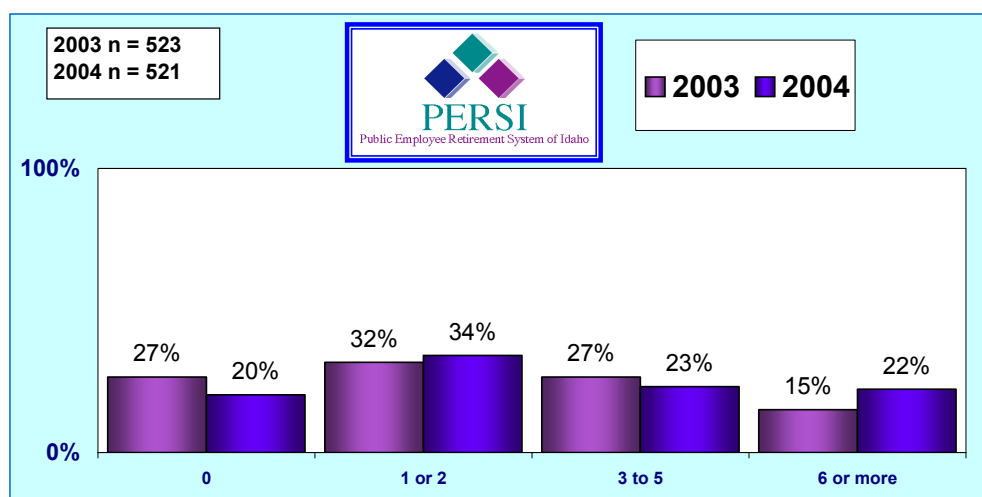
- All employers in the sample were asked Q065, and a total of 521 were collected (See Figure 27).

- 80% of all respondents (n = 415) answered that they had made one or more requests within the last 12 months. 34% of all respondents made one or two requests (n = 178), 23% made three to five (n = 121), and 22% made 6 or more requests (n = 116).

- More respondents reported making information requests in 2004 than 2003.

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FIGURE 28a: Information Requests by Agency Type 2003 (Q065)

n = 523

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Legend: 0 | 1 or 2 | 3 to 5 | 6 or More

Agency	0	1 or 2	3 to 5	6 or More
City n = 123	30%	33%	28%	30%
County n = 33	15%	15%	42%	15%
Other n = 178	35%	40%	18%	35%
School District n = 114	22%	31%	32%	22%
State Agency n = 75	13%	19%	31%	13%
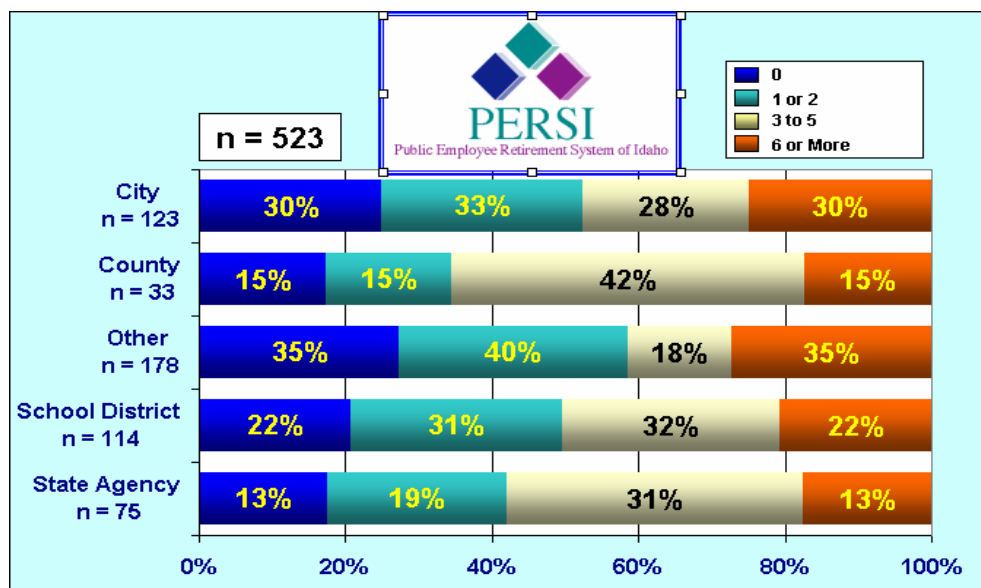
A larger percentage of state agencies reported not to have made a request in 2004 than in 2003.

FIGURE 28b: Information Requests by Agency Type 2004 (Q065)

2003 n = 523
2004 n = 521

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Legend: 0 | 1 or 2 | 3 to 5 | 6 or More

Agency	0	1 or 2	3 to 5	6 or More
City n = 123	11%	21%	42%	26%
County n = 33	43%	31%	14%	11%
Other n = 178	12%	21%	40%	27%
School District n = 114	28%	27%	29%	15%
State Agency n = 75	47%	22%	23%	8%
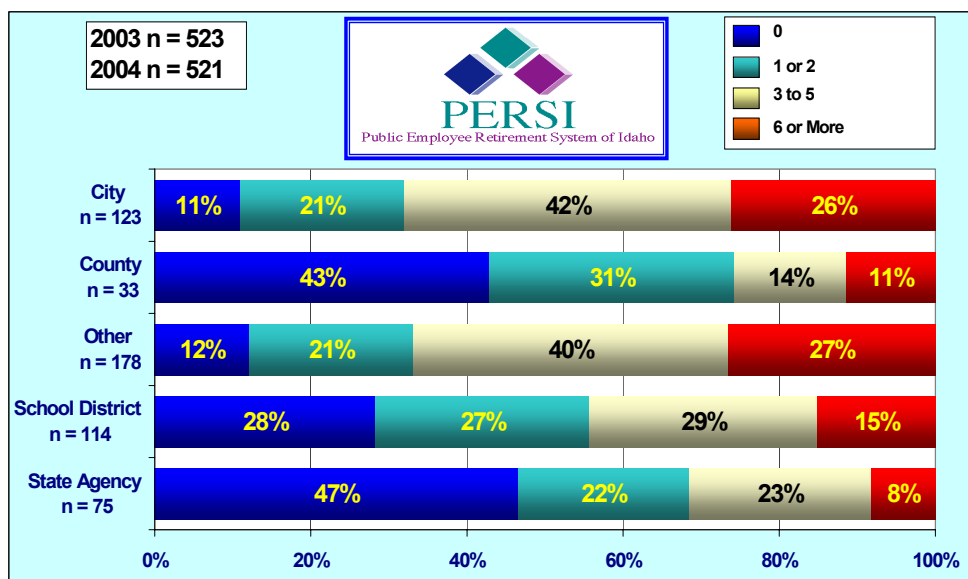
- *AGENCY TYPE:* County and state agencies had a larger percentage of employers who did not make any information requests in 2004. The percentage of state agencies who did not make any information requests increased dramatically between 2003 and 2004.

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FIGURE 29a: Information Request by Agency Size 2003 (Q065)

FIGURE 29b: Information Request by Agency Size 2004 (Q065)
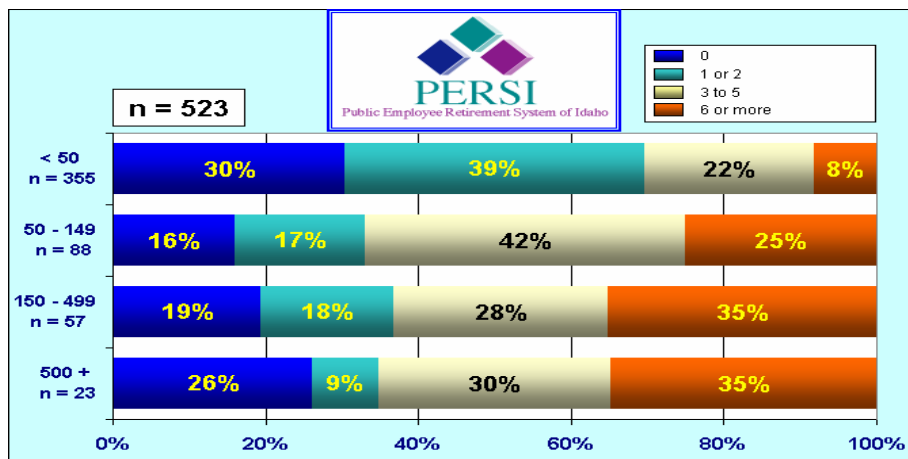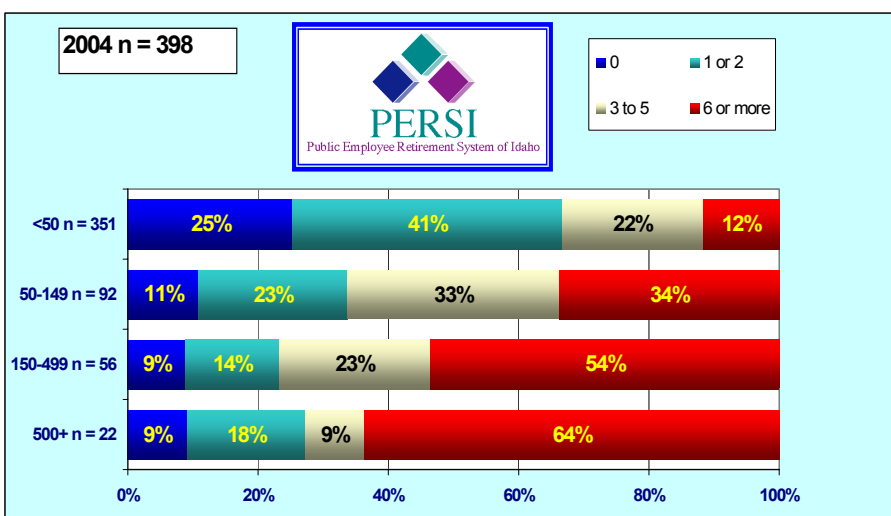
A larger percentage of agencies with 500 or more employees made 6 or more information requests in 2004 than other agencies.

- *AGENCY SIZE:* A larger percentage of agencies with 500 or more employees made 6 or more requests in 2004 than other agencies. In 2003, 35% of agencies with 500 or more employees made 6 or more requests. In 2004, this percentage increased to 64%.

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Q065: For the next few questions, please consider your most recent request to PERSI staff. What was the general nature of the request you made on that occasion?

FIGURE 30: Type of Information Request – Statewide (Q070)

Most common single topic request among those provided concerned transmittal reports, the same topic as in 2003.

2003 n = 361
2004 n = 404

2003 2004

100%

14% 11%   6% 5%   28% 30%   21% 12%   0% 1%   30% 41%

0%

Eligibility   401(k)   Transmittal   Forms or Materials   No request   Other
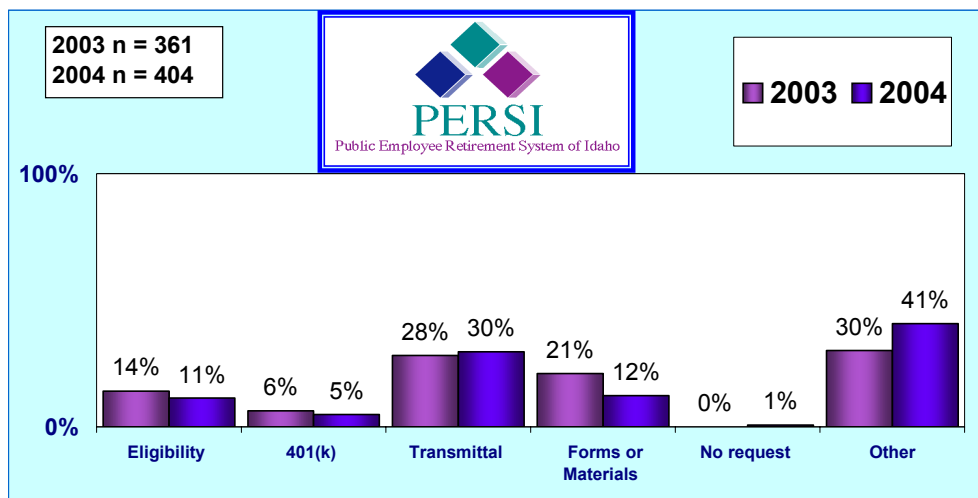
- All employers that had made and information request (Q065) were asked Q070, and a total of 404 answers were collected (See Figure 30).

- Respondents were asked to select one of the following categories: *Eligibility Determination, 401 (k) Question, Transmittal Reporting, Request for Forms or Materials to Help Answer Question, No Information or Request Made,* and *Other*.

- 30% of information requests concerned transmittal reporting (n = 120), 12% requested forms or information to answer questions (n = 50), 11% concerned eligibility determination (n = 46), and 5% were questions about 401(k) questions (n = 20).   The largest percentage of requests concerned categories other than those provided.

- Responses coded as *Other* are included in the Appendix.

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FIGURE 31a: Type of Information Request by Agency Type 2003 (Q070)
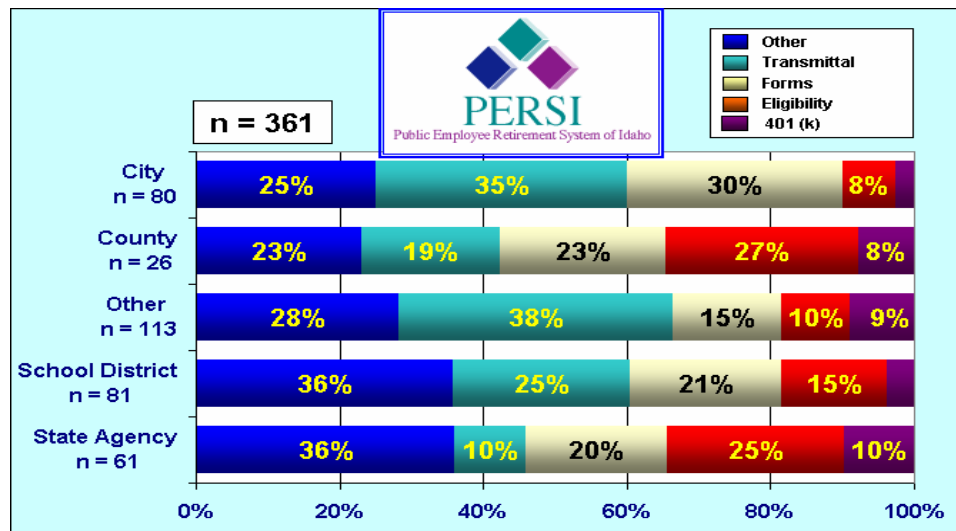
The percentage of agencies requesting information other than the categories provided increased for all agencies types.

FIGURE 31b: Type of Information Request by Agency Type 2004 (Q070)
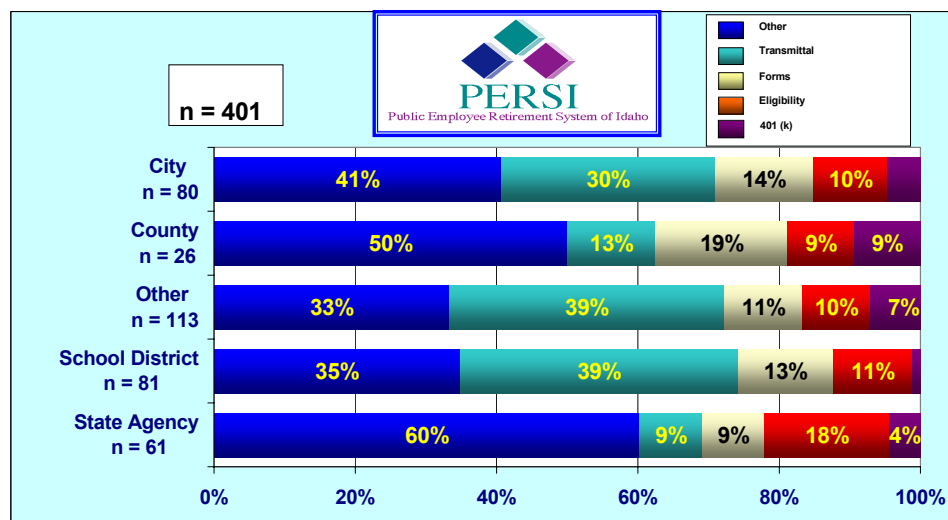
- *AGENCY TYPE:* All agencies showed an increased in the percentage of information requests regarding information other than the categories provided between 2003 and 2004.

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FIGURE 32A: Type of Information Request by Agency Size 2003 (Q070)
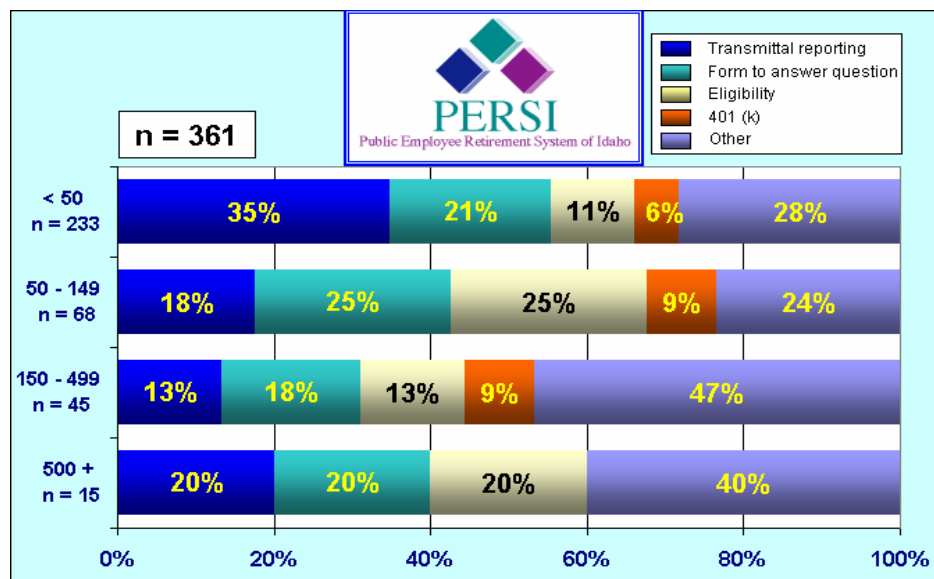
FIGURE 32A: Type of Information Request by Agency Size 2004 (Q070)
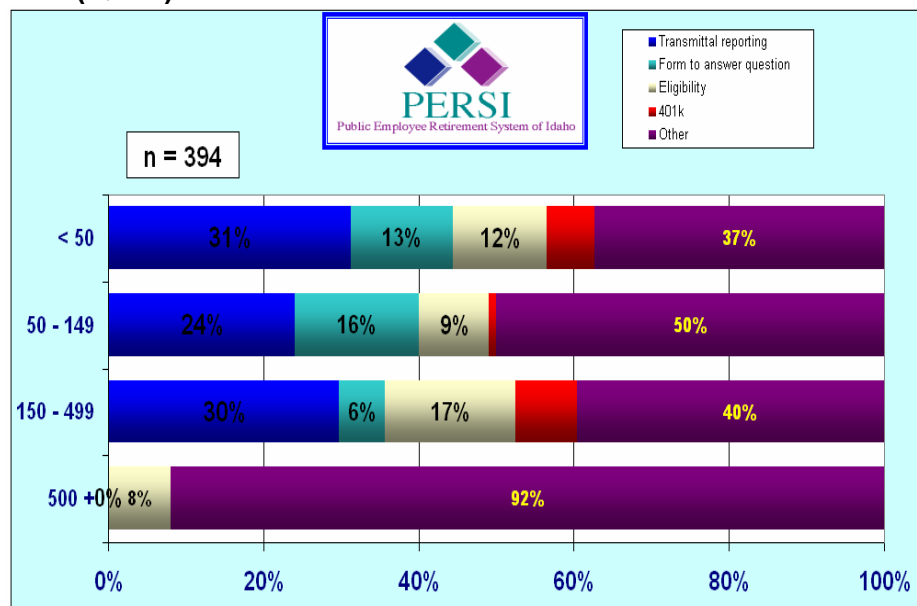
Most information requests for agencies with 500 or more employees concerned information other than the categories provided.

- *AGENCY SIZE:* Most information requests for agencies with 500 or more employees concerned information other than the categories provided.

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Q075: How did you make your most recent request?

FIGURE 33: Request Method – (Q075)

85% of employers made requests by telephone in 2004. This was a decrease from 92% in 2003.
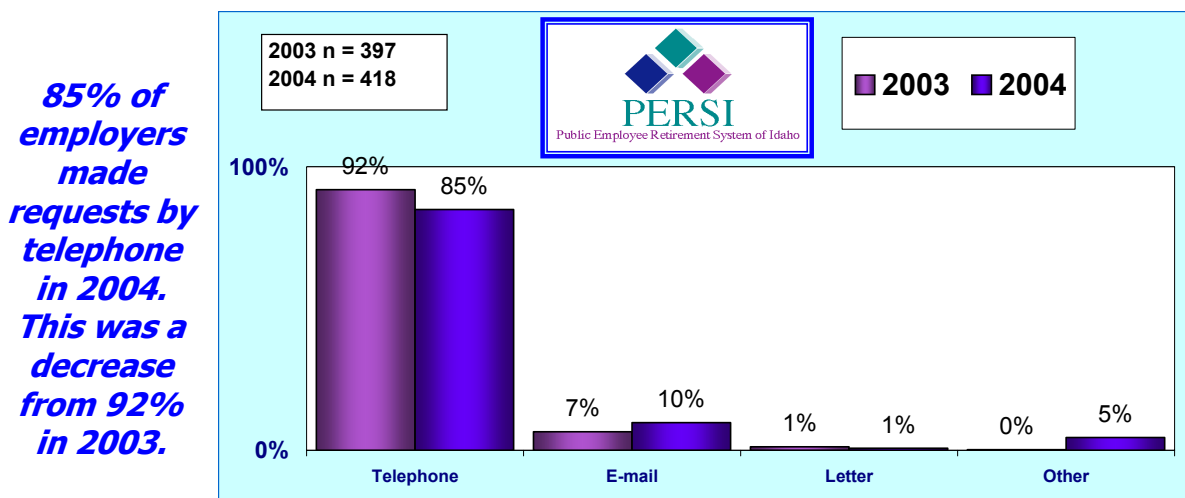
- All employers that made an information request (Q065) were asked Q075, and a total of 418 answers were collected (See Figure 13).

- Respondents were asked to select *Telephone, E-mail, Letter*, or *Other*.

- 85% of respondents information requests were made by *Telephone* (n = 355), 10% by *E-mail* (n = 41), 1% of requests were made by L*etter* (n = 3), and some O*ther* method was used for 5% (n =19) of the requests.

- A larger percentage of respondents reported making information requests through E-*mail* or some O*ther* method in 2004 than in 2003.

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FIGURE 34: Request Method by Agency Type (Q075)

2003 n = 397
2004 n = 418

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■ 2003 Telephone
■ 2004 Telephone

100%

94% 86%   90% 76%   95% 90%   93% 86%   82% 75%

0%

City   County   Other   School District   State Agency
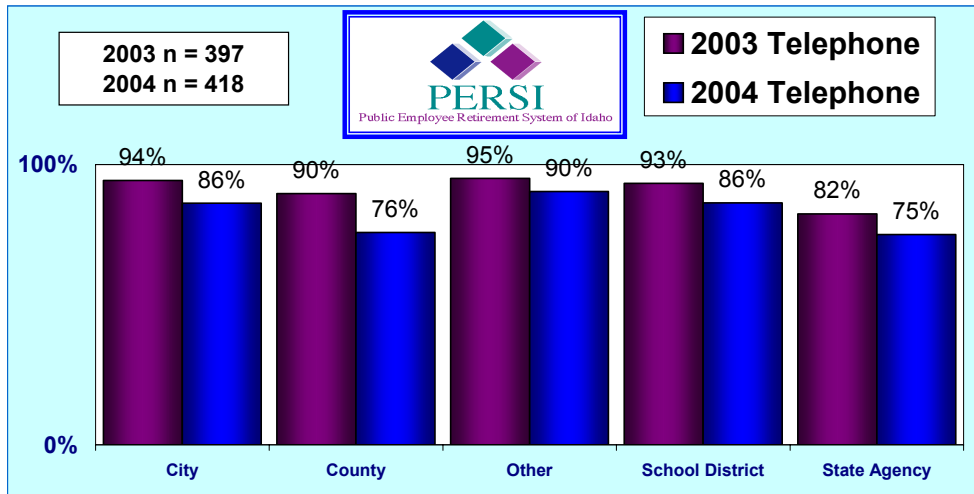
The percentage of agencies requesting information by telephone decreased for all agency types.

- *AGENCY TYPE:* All agencies showed a decrease in requests using the telephone between 2003 and 2004.

FIGURE 35: Request Method by Agency Size (Q075)

2003 n = 397
2004 n = 418

PERSI
Public Employee Retirement System of Idaho

■ 2003 Telephone
■ 2004 Telephone

100%

92% 89%   88% 82%   96% 76%   100% 70%

0%

< 50   50 - 149   150 - 499   500 +
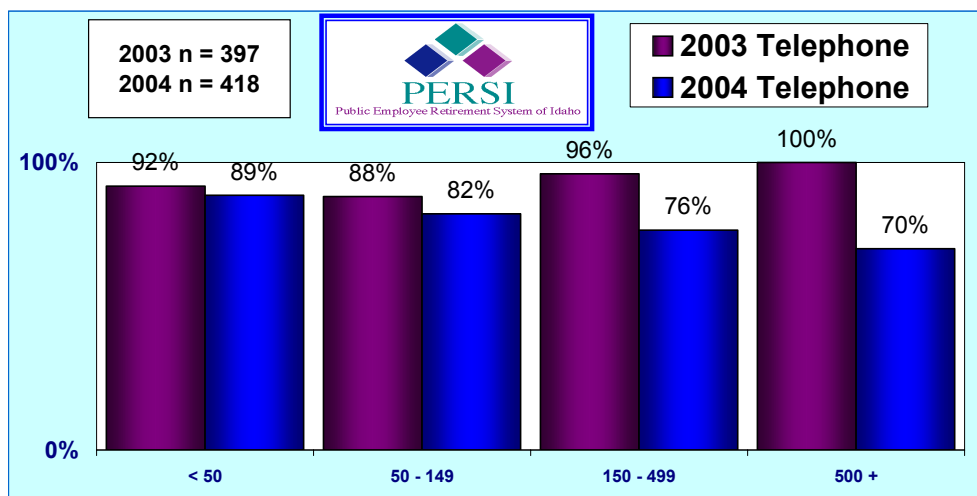
There was a negative relationship between the use of the telephone to make requests and agency size.

- *AGENCY SIZE:* As agency size increased, the less likely the agency was to use the telephone to make information requests. Agencies were less likely to use the telephone in 2003 than 2004, a pattern that also increased with agency size.

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Q080: How satisfied or dissatisfied are you with the way your most recent request was handled?

FIGURE 36: Satisfaction with Information Request Handling (Q080)

*In 2004, 95% of employers were satisfied with how their information request was handled.*

- All employers that had made an information request (Q065) were asked Q080, and a total of 415 answers were collected (See Figure 15).

- Respondents were asked to select from one of the following five categories: *Extremely Satisfied, Somewhat Satisfied, Neither Satisfied nor Dissatisfied, Somewhat Dissatisfied,* and *Extremely Dissatisfied.* Because of low frequency responses, the two *dissatisfied* response categories (viz., *Somewhat* and *Extremely Dissatisfied*) were combined into a single category for reporting and analysis purposes.

- 77% of respondents were *Extremely Satisfied* (n = 318), 18% were *Somewhat Satisfied* (n = 71), 2% were *Neither Satisfied nor Dissatisfied* (n = 3), and 3% were *Dissatisfied* (n = 13).

- Responses in 2004 were similar to responses given in 2003.

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FIGURE 37: Satisfaction with Information Request Handling by Agency Type (Q080)

2003 n = 396
2004 n = 415

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■ 2003 Extremely satisfied
■ 2004 Extremely satsified

100%

City	County	Other	School District	State Agency
78% 83%	79% 82%	79% 79%	77% 71%	74% 74%

0%
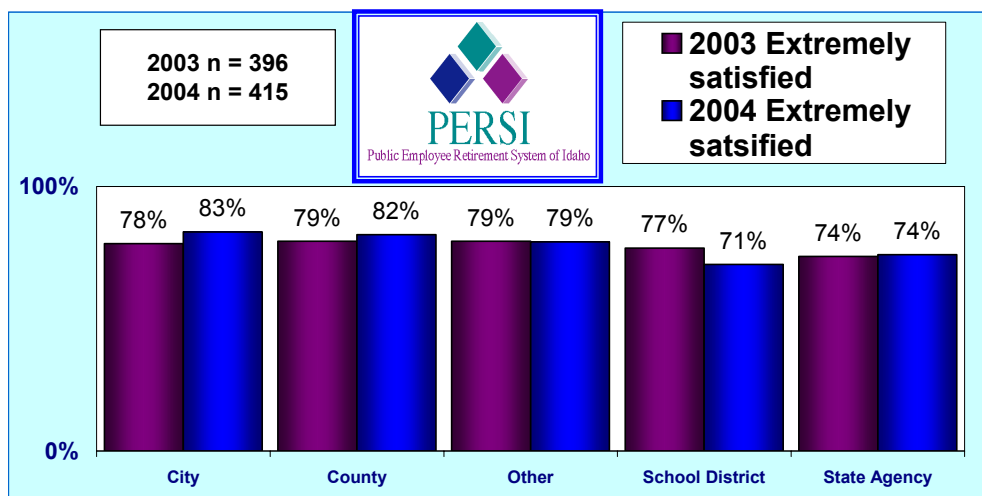
There was no difference in satisfaction with request handling by agency type.

- *AGENCY TYPE:* There was no significant difference in the percentage of agencies that reported they were *Extremely Satisfied* with the handling of their information request by agency type.

FIGURE 38: Satisfaction with Information Request Handling by Agency Size (Q080)
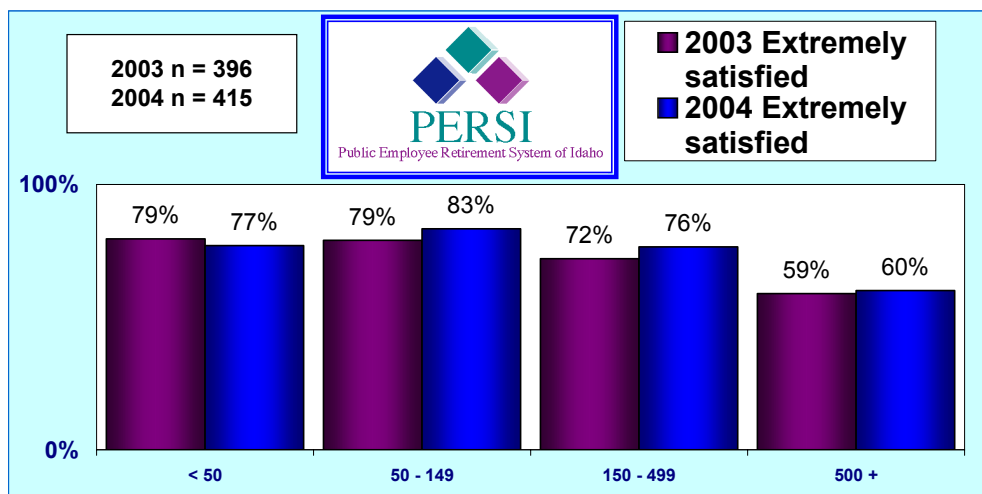
2003 n = 396
2004 n = 415

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■ 2003 Extremely satisfied
■ 2004 Extremely satisfied

100%

< 50	50 - 149	150 - 499	500 +
79% 77%	79% 83%	72% 76%	59% 60%

0%

A smaller percentage of agencies with 500 or more employees reported that they were extremely satisfied with they way their request was handled.

- *AGENCY SIZE:* A smaller percentage of agencies with 500 or more employees reported that they were Extremely Satisfied with the way their information request was handled than other agencies.

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Q090: How many times did you contact PERSI staff regarding your most recent request?

FIGURE 39: Number of Contacts for Request (Q090)

76% of all employers had made only one contact to resolve request in 2004, virtually the same percentage as in 2003.

2003 n = 393
2004 n = 414

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■ 2003 ■ 2004

100%

75% 76%

17% 14%

8% 10%

0%

1   2   3 or more
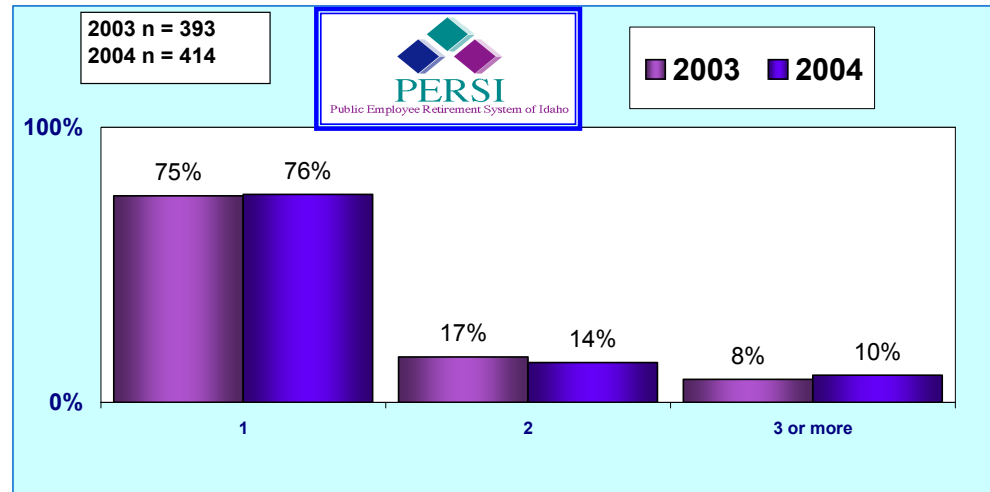
- All respondents that had made an information request (Q065) were asked Q090, and a total of 414 answers were collected (See Figure 17).

- 76% of respondents indicated they only made one contact (n = 313), 14% made two contacts (n = 60), and 10% indicated they made 3 or more contacts (n = 41).

- The number of contacts required to resolve the respondent's most recent request was systematically related to ratings of overall satisfaction (Q010M2). Employers who made only one contact were more satisfied overall with PERSI (mean = 3.69) compared to employers with two contacts (mean = 3.42) and three or more contacts (mean 3.36).

- No significant changes were seen in the number of contacts in the most recent request between 2004 and 2003.

FIGURE 40: Number of Contacts for Request by Agency Type (Q090)
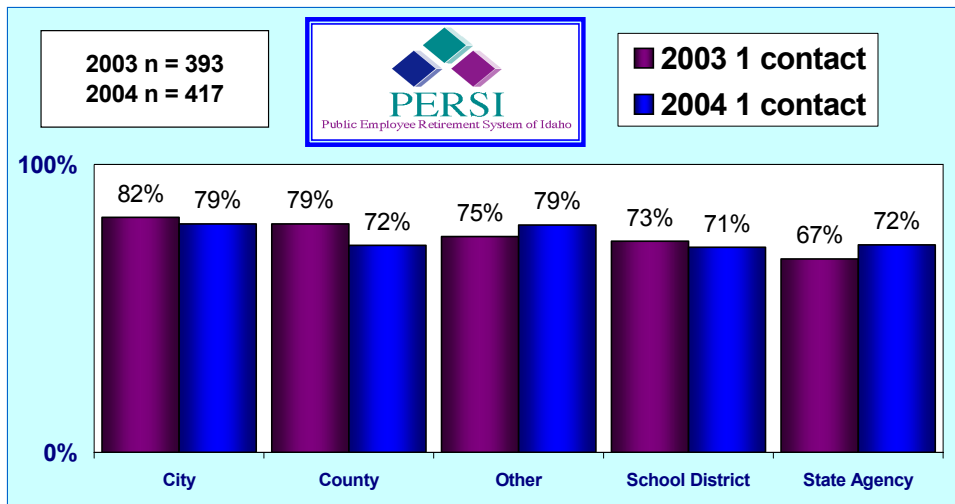
- *AGENCY TYPE:* A smaller percentage of school districts and state agencies reported that they made one contact regarding their most recent request to PERSI than other agencies.

FIGURE 41: Number of Contacts for Request by Agency Size (Q090)
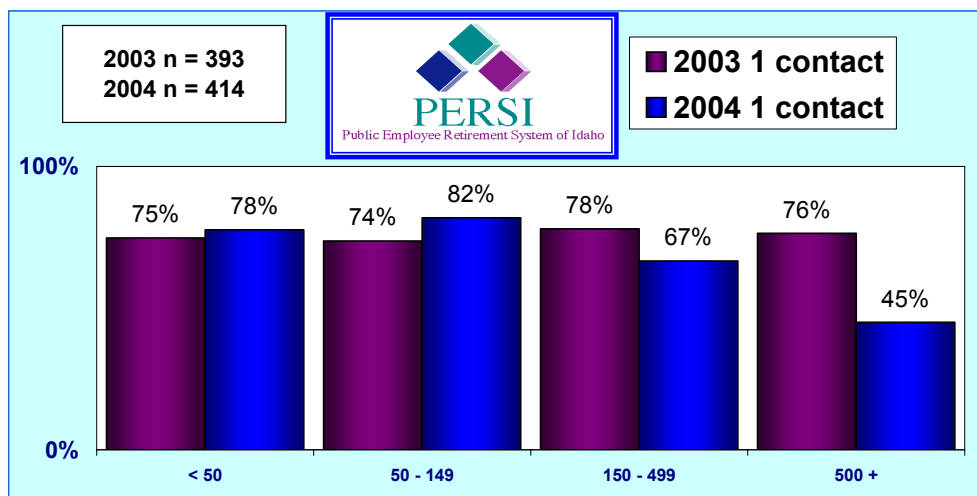
- *AGENCY SIZE:* A smaller percentage of agencies with 500 or more employees reported that they made only one contact with PERSI regarding their last information request than other agencies. There was a decrease in the percentage of agencies with 500 or more employees who reported that they only made one request between 2003 and 2004.

Q095: How much time was required by PERSI staff to handle your most recent request?

FIGURE 42: Time to Handle Request – Statewide (Q095)

80% of employers surveyed had request resolved the same day in 2004, a slightly larger percentage than in 2003.

2003 n = 382
2004 n = 400

■ **2003** ■ **2004**

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- Same day: 77% (2003), 80% (2004)
- Couple of days: 17% (2003), 15% (2004)
- Week or more: 6% (2003), 6% (2004)
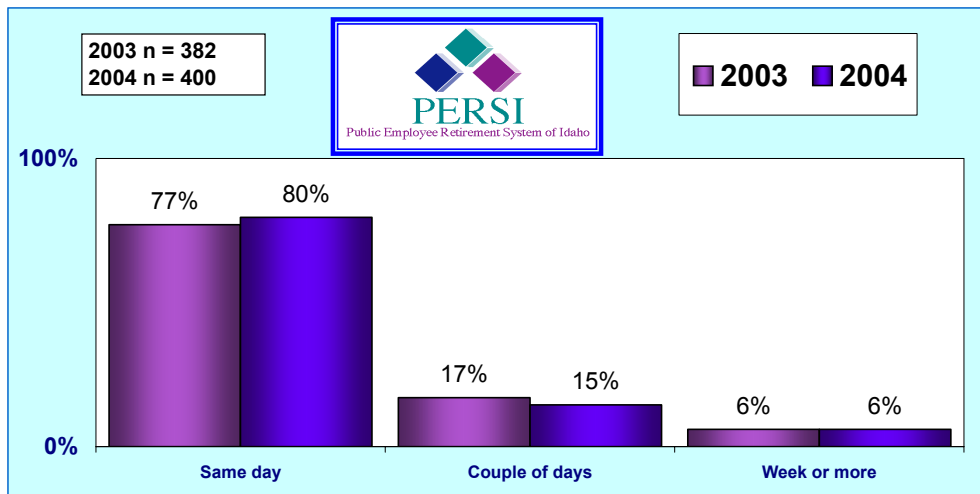
- All respondents that had made an information request (Q065) were asked Q095 and a total of 400 answers were collected (See Figure 19).

- Respondents were asked to select between *the same day, a couple of days, a week, a couple of weeks, or a month or more*. The last three categories were combined for analysis.

- 80% of respondents said their request was resolved the same day (n = 318), 15% said a couple of days (n = 58), and 6% said a week or more (n = 24).

- No significant changes were seen in the amount of time required by PERSI staff to handle the request between 2003 and 2004.

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FIGURE 43: Time to Handle Request by Agency Type (Q095)
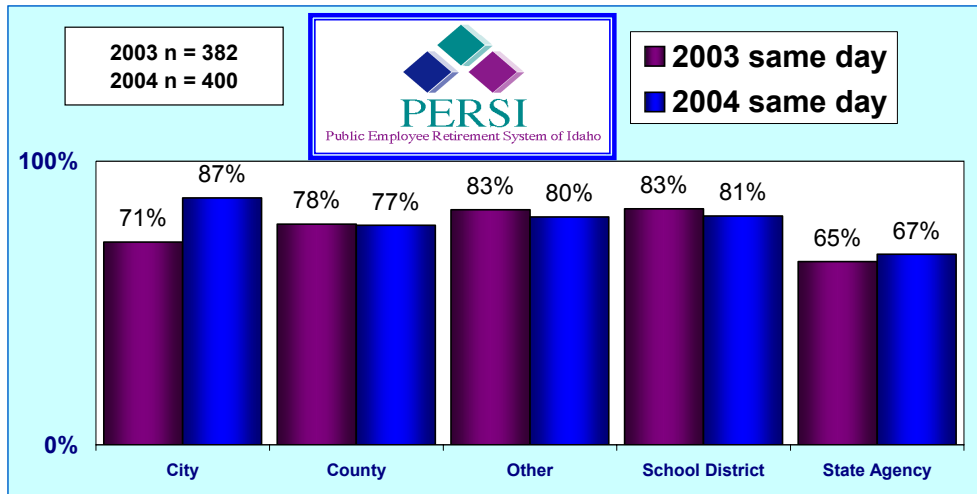
2003 n = 382
2004 n = 400

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■ 2003 same day
■ 2004 same day

	City	County	Other	School District	State Agency
2003	71%	78%	83%	83%	65%
2004	87%	77%	80%	81%	67%

A smaller percentage of state agencies reported that PERSI responded to their request the same day than other agencies.

- *AGENCY TYPE:* A smaller percentage of stage agencies reported that PERSI responded to their request the same day than other agencies.

FIGURE 44: Time to Handle Request by Agency Size (Q095)

2003 n = 382
2004 n = 400

PERSI
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■ 2003 same day
■ 2004 same day

	< 50	50 - 149	150 - 499	500 +
2003	80%	73%	76%	56%
2004	81%	86%	68%	63%
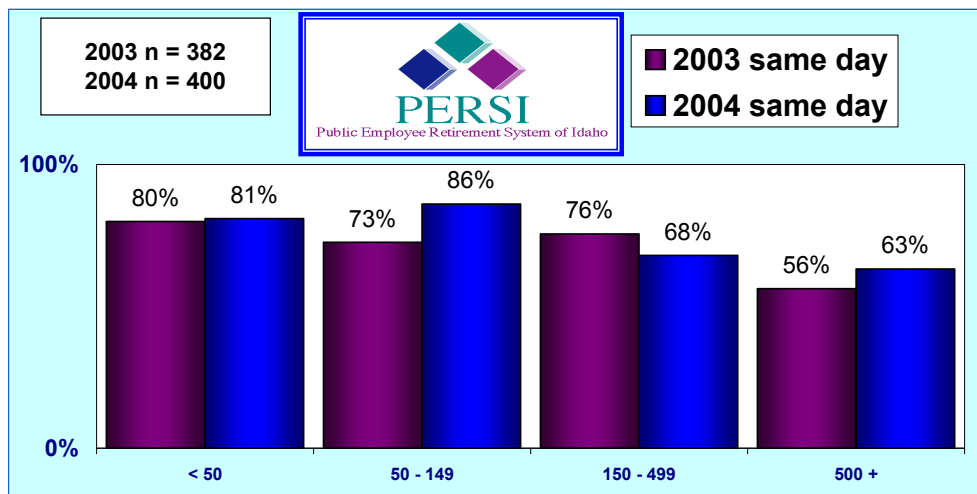
A smaller percentage of agencies with 500 or more employees reported that PERSI responded to their request the same day than other agencies.

- *AGENCY SIZE:* A smaller percentage of stage agencies reported that PERSI responded to their request the same day than other agencies.

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Q100: How much time should it ideally take for PERSI to handle your most recent request?

FIGURE 45: Time it Should Take to Handle Request (Q100)

In 2004, 67% of employers surveyed thought it should take 1 day to handle information requests.
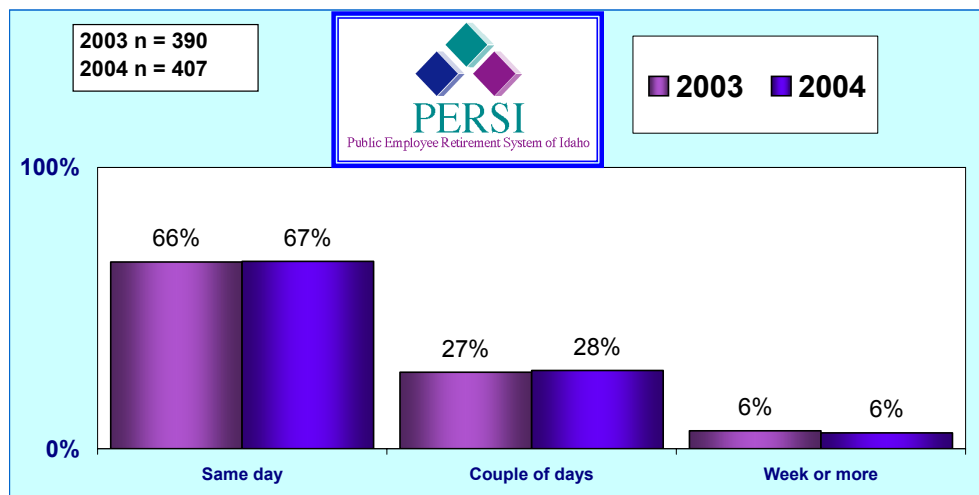
- All respondents that had made an information request (Q065) were asked Q100, and a total of 407 answers were collected (See Figure 21).

- Respondents were asked to select between *The Same Day, A Couple of Days, A Week, A Couple of Weeks, or A Month or More*. The last three categories were combined for analysis.

- 67% of respondents said there request should be resolved *The Same Day* (n = 271), 28% said *A Couple of Days* (n= 113), and 6% said *A Week or More* (n = 23).

- No significant changes were seen in the time employers thought it should take to handle a request between 2003 and 2004.

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FIGURE 46: Time it Should Take to Handle Request by Agency Type (Q100)

2003 n = 390
2004 n = 407

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■ 2003 same day
■ 2004 same day

100%

60% 67%   76% 53%   69% 70%   73% 78%   57% 48%

0%

City   County   Other   School District   State Agency
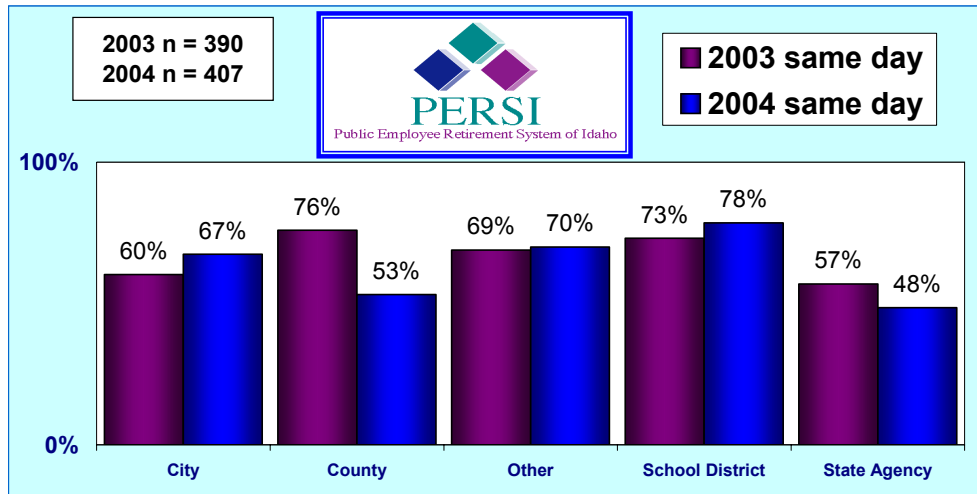
A larger percentage of counties reported that it should talk PERSI one day to respond to their request than other agencies.

- *AGENCY TYPE:* A larger percentage of county agencies reported that it should take one day for PERSI to handle their information request than other agencies.

FIGURE 47: Time it Should Take to Handle Request by Agency Size (Q100)

2003 n = 390
2004 n = 407

PERSI
Public Employee Retirement System of Idaho

■ 2003 same day
■ 2004 same day

100%

68% 69%   65% 66%   60% 59%   65% 63%

0%

< 50   50 - 149   150 - 499   500 +
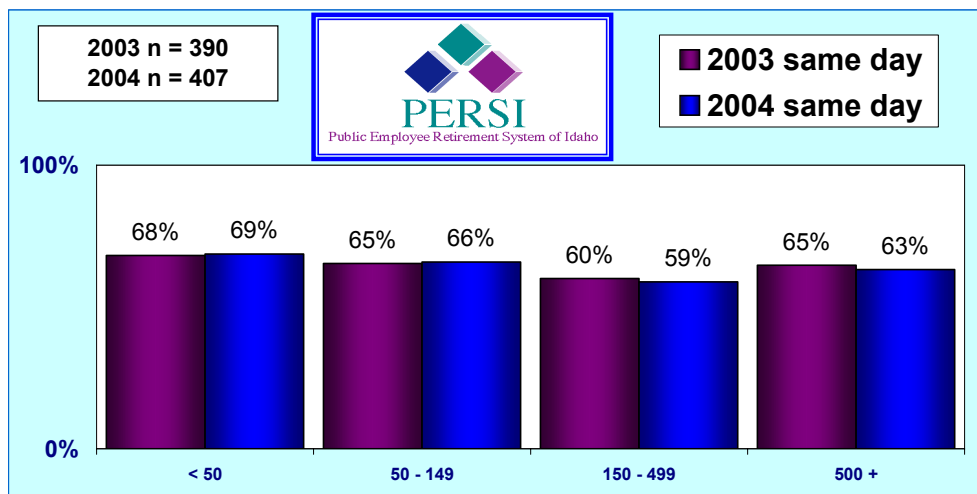
There were slight differences in the percentage of agencies reporting it should take one day to respond to requests by agency size.

- *AGENCY SIZE:* There were slight differences in the percentage of agencies who reported that it should take one day for PERSI to respond to requests with regard to agency size.

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Q105: Which of the following best describes the overall usefulness of the information you received from PERSI?

FIGURE 48: Usefulness of Information Received (Q105)

In 2004, 79% of employers surveyed thought information received was mostly useful.
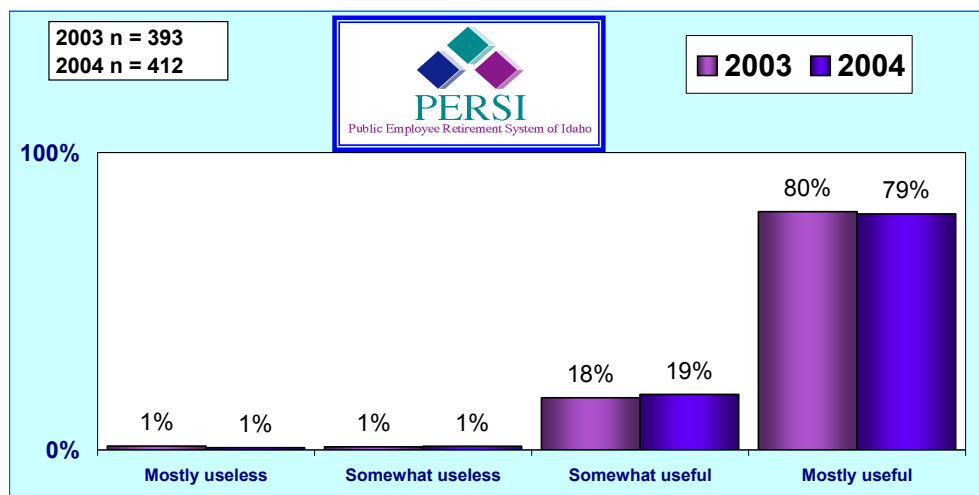
- All respondents that had made an information request (Q065) were asked Q105, and a total of 412 answers were collected (See Figure 23).

- Respondents were asked to select between *Mostly Useful, Somewhat Useful, Somewhat Useless, or Mostly Useless.*

- 79% of respondents said the information received was *Mostly Useful* (n = 327), 19% said a *Somewhat Useful* (n = 77), 1% said *Somewhat Useless* (n = 5), and 1% said the information was *Mostly Useless* (n = 3).

- No significant changes were seen in the usefulness of information received between 2003 and 2004.

FIGURE 49: Usefulness of Information Received by Agency Type (Q105)

2003 n = 393
2004 n = 412

PERSI
Public Employee Retirement System of Idaho

■ 2003 Mostly useful
■ 2004 Mostly useful

100%

City	County	Other	School District	State Agency
80% 80%	79% 94%	81% 82%	80% 70%	79% 79%

0%
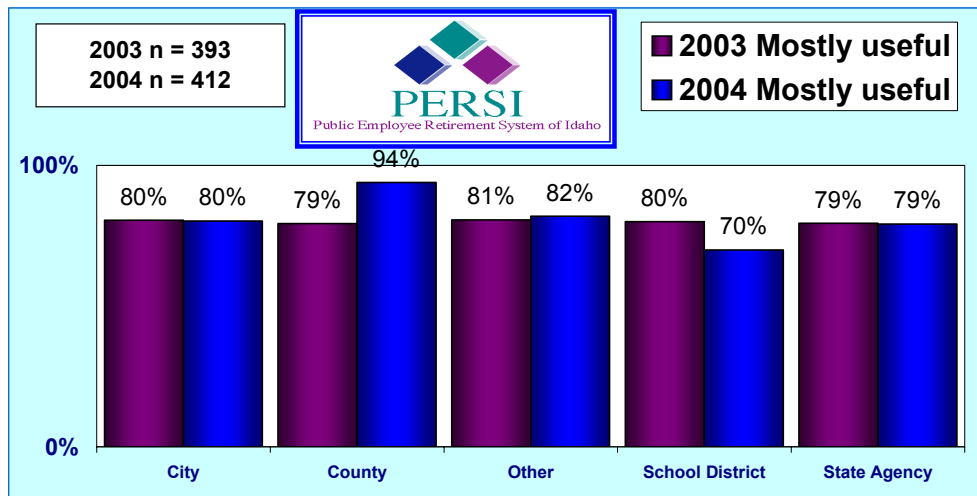
Nearly all county agencies reported that information was mostly useful.

- **AGENCY TYPE:** Nearly all county agencies reported that information provided by PERSI was *Mostly Useful*. A smaller percentage of school districts reported that information was *Mostly Useful* than other agencies.

FIGURE 50: Usefulness of Information Received by Agency Size (Q105)
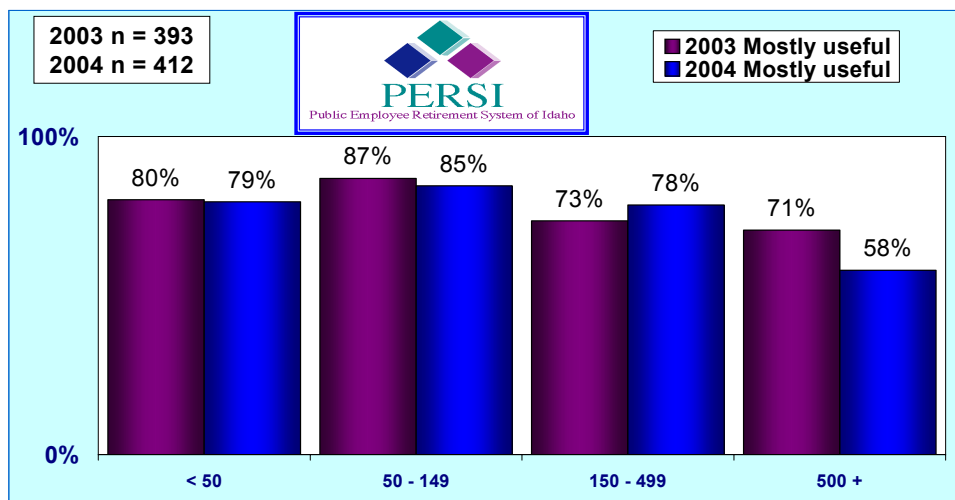
2003 n = 393
2004 n = 412

PERSI
Public Employee Retirement System of Idaho

■ 2003 Mostly useful
■ 2004 Mostly useful

100%

< 50	50 - 149	150 - 499	500 +
80% 79%	87% 85%	73% 78%	71% 58%

0%

A smaller percentage of agencies with 500 or more employees reported that information was mostly useful.

- **AGENCY SIZE:** A smaller percentage of agencies with 500 or more employees reported that information provided by PERSI was Mostly Useful.

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Q110: How satisfied or dissatisfied are you with the accuracy of the information you received from PERSI staff regarding your request?

FIGURE 51: Satisfaction with Information Accuracy (Q110)

95% of employers were satisfied with the accuracy of information received in 2004, a slight decrease from 97% in 2003.

2003 n = 391
2004 n = 413

PERSI
Public Employee Retirement System of Idaho

■ 2003 ■ 2004

100%

81% 79%

17% 16%

1% 1%   2% 3%

0%

Dissatisfied | Neither satisfied nor dissatisfied | Somewhat satisfied | Extremely satisfied
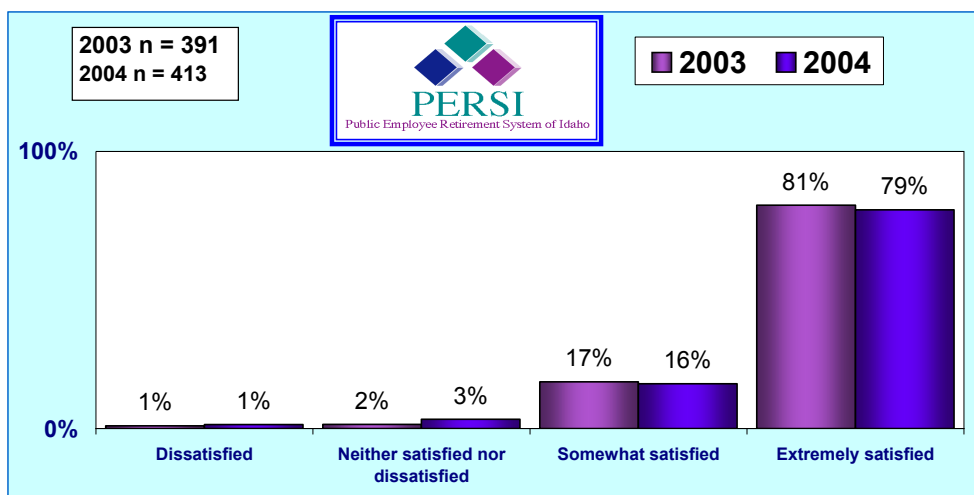
- All employers that had made an information request (Q065) were asked Q110, and a total of 413 answers were collected (See Figure 25).

- Respondents were asked to select from one of the following five categories: *Extremely Satisfied, Somewhat Satisfied, Neither Satisfied nor Dssatisfied, Somewhat Dissatisfied,* and *Extremely Dissatisfied.* Because of low frequency responses, the two *dissatisfied* response categories (viz., *Somewhat* and *Extremely Dissatisfied*) were combined into a single category for reporting and analysis purposes.

- 79% of respondents were *Extremely Satisfied* (n = 336), 16% were *Somewhat Satisfied* (n = 67), 3% were *Neither Satisfied nor Dissatisfied* (n = 14), and 1% were *Dissatisfied* (n = 6).

- No significant changes were seen in satisfaction with information accuracy between 2003 and 2004.

FIGURE 52: Satisfaction with Information Accuracy by Agency Type (Q110)

County agencies were the most likely to report that they were extremely satisfied with information accuracy.
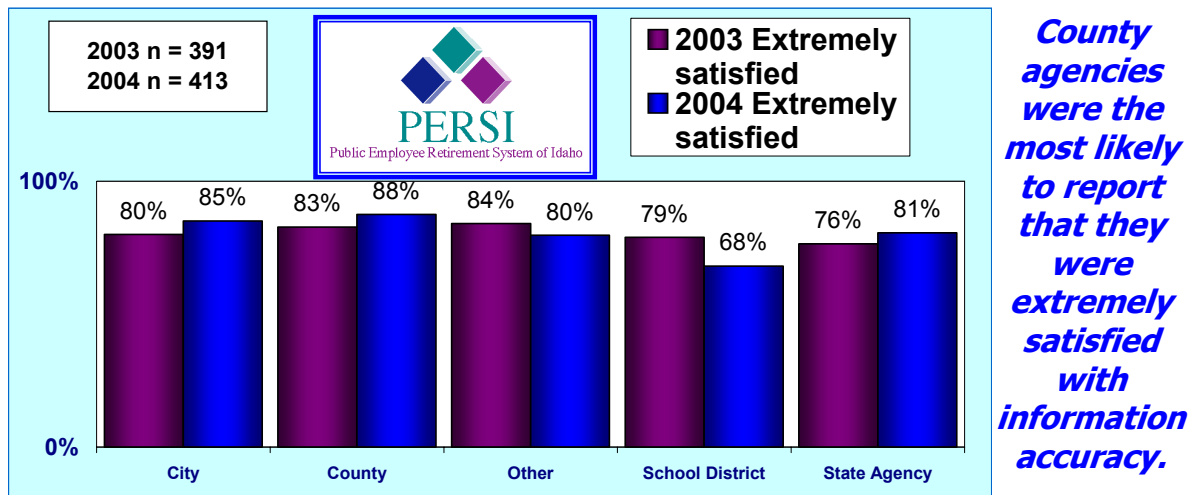
- *AGENCY TYPE:*   County agencies were the most likely to report that they were *Extremely Satisfied* with information accuracy. School districts were the least likely to report that they were *Extremely Satisfied* with information accuracy.

FIGURE 53: Satisfaction with Information Accuracy by Agency Size (Q110)

A smaller percentage of agencies with 500 or more employees reported that they were extremely satisfied with information accuracy than other agencies.

- *AGENCY SIZE:*   A smaller percentage of agencies with 500 or more employees reported that they were *Extremely Satisfied* with information accuracy than other agencies.

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Q115: PERSI effectively communicates transmittal reporting requirements to me.

FIGURE 54: Communicates Transmittal Requirements (Q115)

In 2004, 95% of all employers agree PERSI effectively communicates transmittal requirements, a slight increase from 2003.
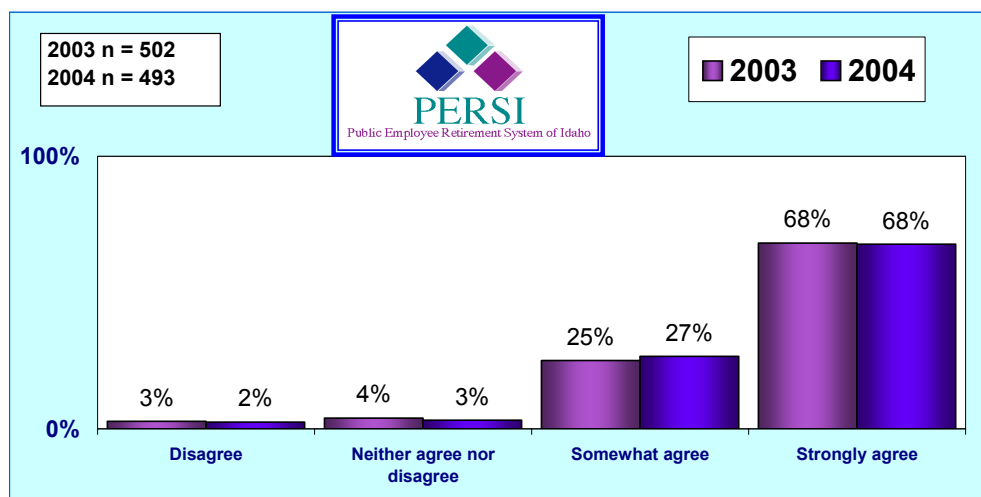
- All employers in the sample were asked Q115, and a total of 493 answers were collected (See Figure 29).

- Respondents were asked to select from one of the following five categories: *Strongly Agree, Somewhat Agree, Neither Agree nor Disagree, Somewhat Disagree,* and *Strongly Disagree.* Because of low frequency responses, the two *disagree* response categories (viz., *Somewhat* and *Extremely Disagree*) were combined into a single category for reporting and analysis purposes.

- Overall, 68% of respondents *Strongly Agree* that PERSI effectively communicates transmittal requirements (n = 334), 27% *Somewhat Agree* (n = 131), 3% *Neither Agree nor Disagree* (n = 16), and 2% *Disagree* (n = 12).

- No significant changes were seen in perceptions of effective communication of transmittal reporting requirements between 2003 and 2004.

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FIGURE 55: Communicates Transmittal Requirements by Agency Type (Q115)
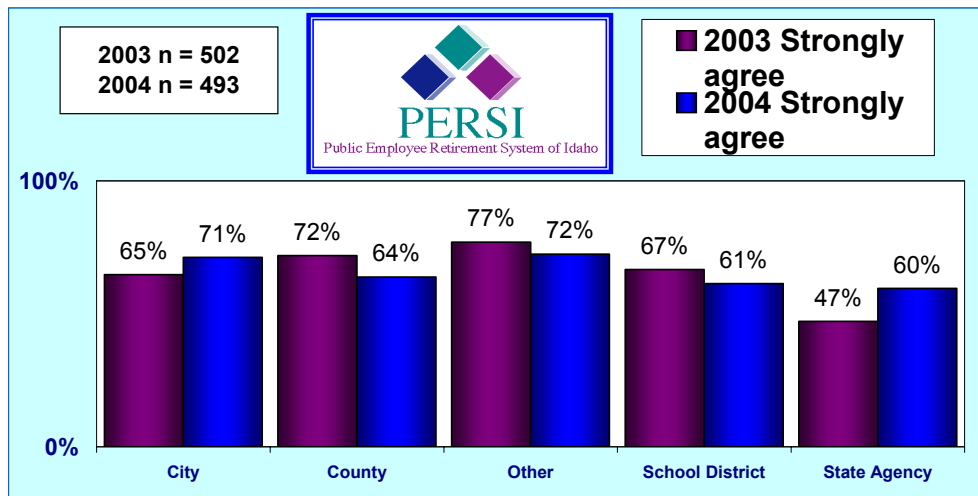
- *AGENCY TYPE:* There was no significant difference in agreement that PERSI effectively communicates transmittal reporting requirements by agency type.

FIGURE 56: Communicates Transmittal Requirements by Agency Size (Q115)
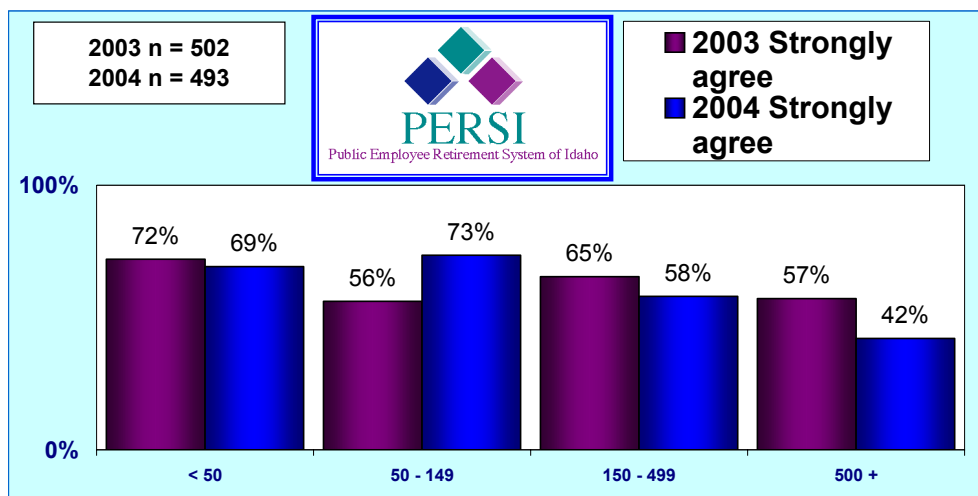
- *AGENCY SIZE:* A smaller percentage of agencies with 500 or more employees Strongly Agree that PERSI effectively communicated transmittal requirements than other agencies.

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Q120: PERSI effectively communicates electronic fund transfer requirements to me.

FIGURE 57: Communicates EFT Requirements (Q120)

88% of all employers agree PERSI effectively communicates EFT requirements.
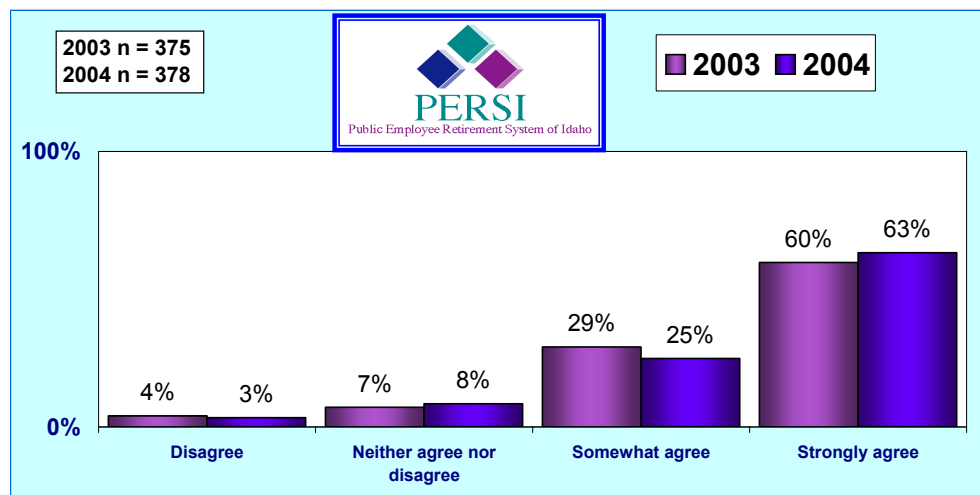
- All employers in the sample were asked Q120, and a total of 378 answers were collected (See Figure 31).

- Respondents were asked to select from one of the following five categories: *Strongly Agree, Somewhat Agree, Neither Agree nor Disagree, Somewhat Disagree,* and *Strongly Disagree.* Because of low frequency responses, the two *disagree* response categories (viz., *Somewhat* and *Extremely Disagree*) were combined into a single category for reporting and analysis purposes.

- Overall, 63% of respondents *Strongly Agree* that PERSI effectively communicates EFT requirements (n = 239), 25% *Somewhat Agree* (n = 94), 8% *Neither Agree nor Disagree* (n = 32), and 3% *Disagree* (n = 13).

- No significant changes were seen the perception of effective communication of electronic fund transfer requirements between 2003 and 2004.

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FIGURE 58: Communication of EFT Requirements by Agency Type (Q120)
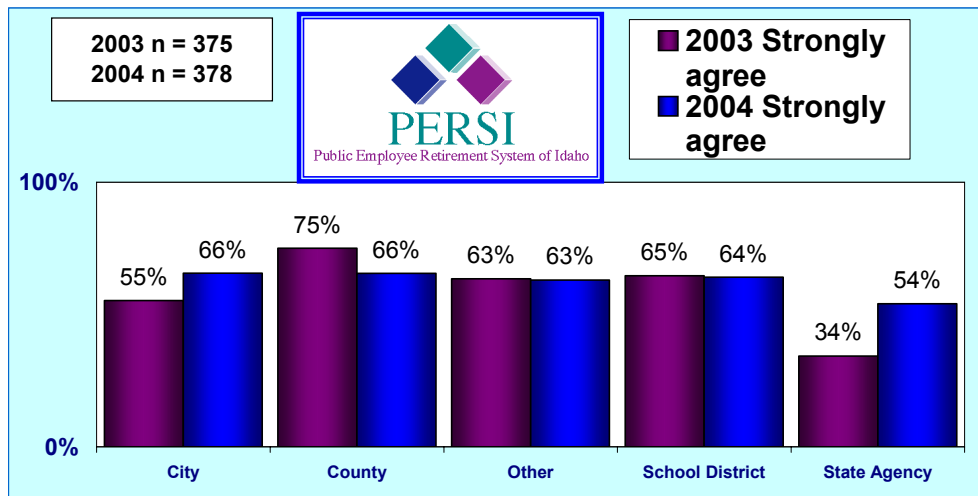
2003 n = 375
2004 n = 378

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■ 2003 Strongly agree
■ 2004 Strongly agree

100%

City: 55% / 66%
County: 75% / 66%
Other: 63% / 63%
School District: 65% / 64%
State Agency: 34% / 54%

0%

City   County   Other   School District   State Agency

There was no significant difference in agreement on effective communication of EFT requirements by agency type.

- *AGENCY TYPE:* There was no significant difference in agreement that PERSI effectively communicates EFT requirements by agency type. A larger percentage of state agencies strongly agreed that PERSI communicates EFT requirements effectively in 2004 than in 2003.

FIGURE 59: Communication of EFT Requirements by Agency Size (Q120)

2003 n = 375
2004 n = 378

PERSI
Public Employee Retirement System of Idaho

■ 2003 Strongly agree
■ 2004 Strongly agree

100%

< 50: 61% / 63%
50 - 149: 54% / 69%
150 - 499: 61% / 56%
500 +: 56% / 63%

0%

< 50   50 - 149   150 - 499   500 +
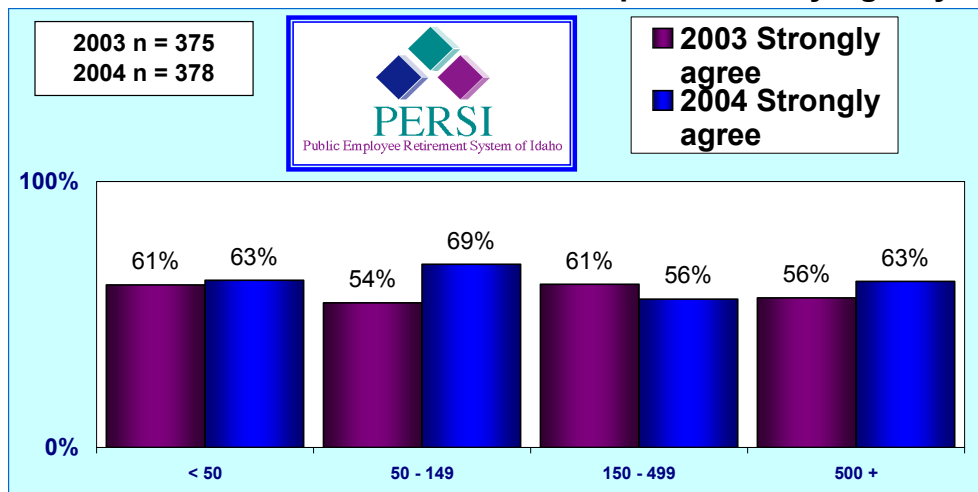
There was no difference in agreement on effective communication of EFT requirements by agency size

- *AGENCY SIZE:* There was no significant difference in agreement that PERSI effectively communicated EFT requirements by agency size.

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Q125: PERSI effectively communicates annual audit expectations to me.

FIGURE 60: Communicates Audit Expectations (Q125)

88% of all employers agree PERSI effectively communicates audit expectations

2003 n = 375
2004 n = 378

■ **2003** ■ **2004**

PERSI
Public Employee Retirement System of Idaho

100%

0%

| | 4% | 3% | 7% | 8% | 29% | 25% | 60% | 63% |

Disagree | Neither agree nor disagree | Somewhat agree | Strongly agree
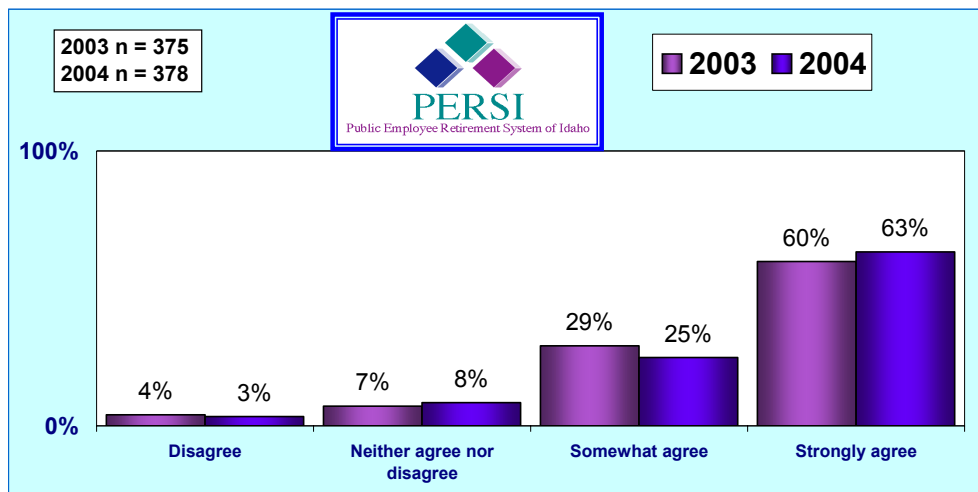
- All employers in the sample were asked Q125, and a total of 410 answers were collected (See Figure 33).

- Respondents were asked to select from one of the following five categories: *Strongly Agree, Somewhat Agree, Neither Agree nor Disagree, Somewhat Disagree,* and *Strongly Disagree.* Because of low frequency responses, the two *disagree* response categories (viz., *Somewhat* and *Extremely Disagree*) were combined into a single category for reporting and analysis purposes.

- Overall, 60% of respondents *Strongly Agree* that PERSI effectively communicates audit expectations (n = 244), 28% *Somewhat Agree* (n = 115), 8% *Neither Agree nor Disagree* (n = 32), and 5% *Disagree* (n = 19).

- No significant changes were seen in the perception of effective communication of audit expectations between 2003 and 2004.

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FIGURE 61: Communicates Audit Expectations by Agency Type (Q125)

2003 n = 434
2004 n = 427

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Public Employee Retirement System of Idaho

■ 2003 Strongly agree
■ 2004 Strongly agree

100%

	City	County	Other	School District	State Agency
2003	62%	65%	63%	57%	44%
2004	62%	67%	54%	59%	51%

0%
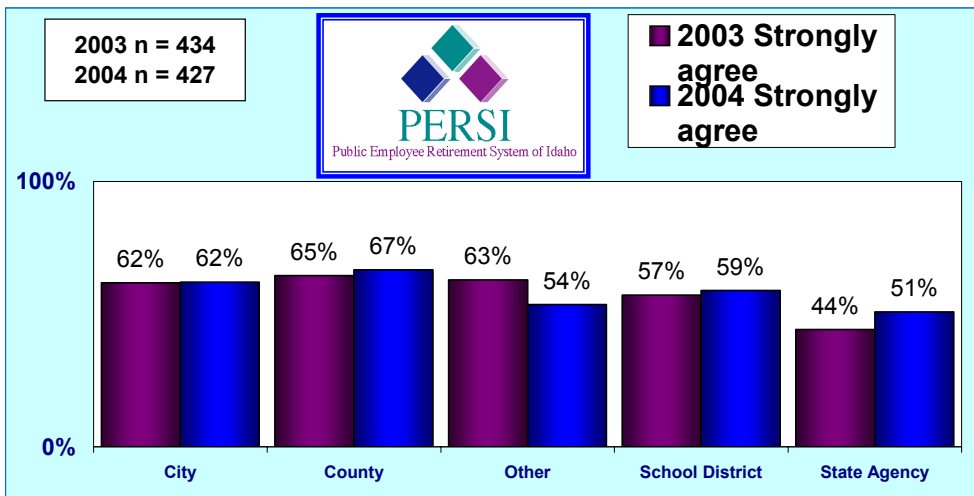
There was no significant difference in agreement on effective communication by agency type.

- *AGENCY TYPE:* There was no significant difference in agreement that PERSI effectively communicates audit expectations by agency type.

FIGURE 62: Communicates Audit Expectations by Agency Size (Q125)
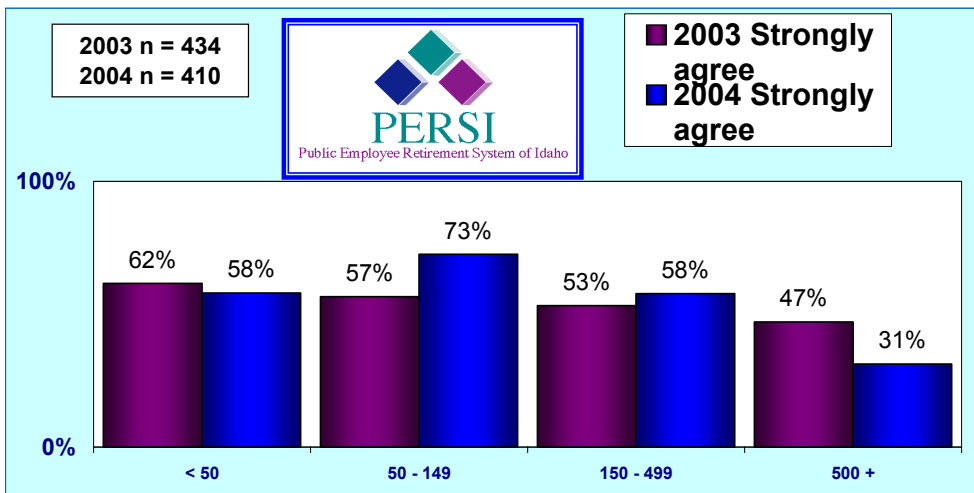
2003 n = 434
2004 n = 410

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■ 2003 Strongly agree
■ 2004 Strongly agree

100%

	< 50	50 - 149	150 - 499	500 +
2003	62%	57%	53%	47%
2004	58%	73%	58%	31%

0%

Only 31% of agencies with 500 or more employees strongly agreed that PERSI effectively communicates audit expectations.

- *AGENCY SIZE:* Only 31% of agencies with 500 or more employees strongly agreed that PERSI effectively communicates audit expectations. Due to small sample sizes, it is not possible to determine if differences exist in agreement that PERSI effectively communicates audit expectations by agency size.

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Q130:Think back on your experiences communicating with PERSI over the past year. What additional services or changes you would like to see?

FIGURE 63: Top Services Requested (Q130)

32% of responding employers request improvements in transmittal procedures.

- All employers in the sample were asked Q130, and a total of 128 respondent's answers were collected (See Figure 35).

- Respondents were asked to provide up to three additional services. Interviewers coded responses into categories as follows where similar: *Provide better notification/ top down information flow, Improve response to information requests / access to information, Improve transmittal / electronic filing procedures, Training for payroll personnel, Improve member access to plan/ account information, Provide member training retirement planning / benefits.* Any response not similar to the above categories was coded *Other.*
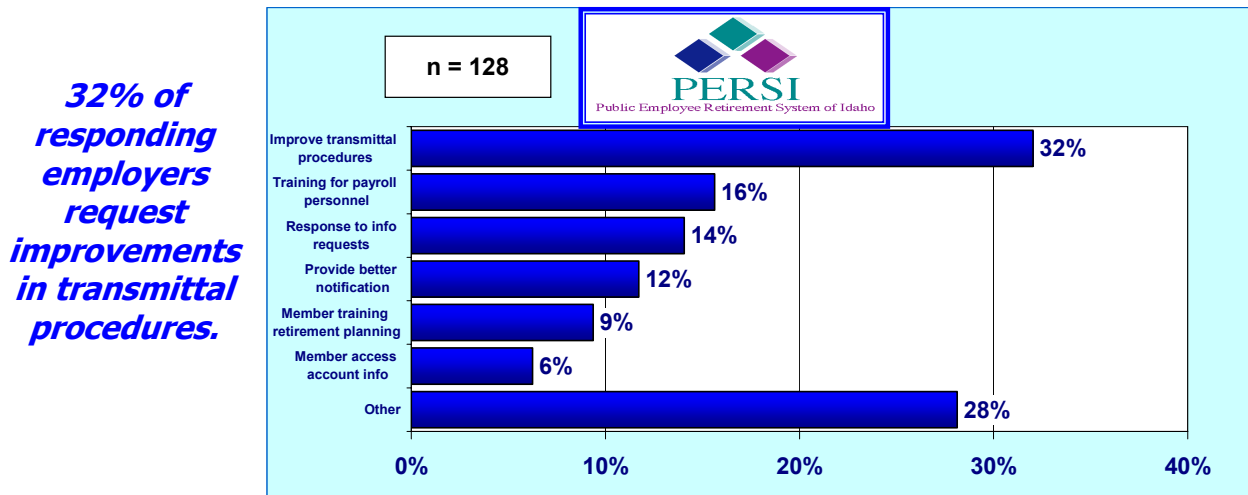
- 16% of respondents requested *Training for Payroll Personnel* (n = 20), 9% requested *Member Training for Retirement Planning* (n = 12), 32% requested *Improvements to the Transmittal Procedures* (n = 41), 14% requested *Improved Response to Information Requests* (n = 18), 12% requested *Better Notification* (n= 15), 6% requested *Member Access to Account Information* (n = 8), and 28% requested some *Other* change (n = 36).

- Full text of the *Other* category responses can be found in Appendix B (p. 94-95).

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Appendices

Appendix A: Survey Instrument

<u>2003 PERSI EMPLOYER TRANSACTION SURVEY</u>

ANSWERING MACHINE SCRIPT

<SHOW PHONE NUMBER EXTENSION AND RECORD NUMBER >

Hello, this is _____ calling on behalf of the Public Employee Retirement System of Idaho. We are conducting a survey of payroll and administrative professionals to help PERSI provide better service to employers. To complete the interview or to schedule a time to be interviewed please call us toll free at 1-800-727-5016 extension 401. When you call, please mention that your survey identification number is 204A - <Insert Record Number>

Thank you very much. Goodbye

1. LEFT MESSAGE – **ASSIGN MESSAGE DISPOSITION AND END**
2. *INCOMPLETE MESSAGE LEFT – **DISPLAY MANUALLY REDIAL AND COMPLETE MESSAGE***
3. *DID NOT LEAVE MESSAGE – **ASSIGN ANSWERING MACHINE DISPOSITION AND END***
* This message will only be left on the 4th instance of answering machine/ voice mail*
* DISPLAY "PRESS 3 TO TERMINATE" when not 4th instance*
  *CHOICES 1 AND 2 ONLY AVAILABLE AT 4TH INSTANCE *

LIVEMSG MESSAGE SCRIPT WHEN SPEAKING WITH A PERSON

<SHOW PHONE NUMBER EXTENSION AND RECORD NUMBER >

This is message is for <CONTACT NAME>. Clearwater Research is conducting a survey of payroll and administrative professionals to help PERSI provide better service to employers. To complete the interview or to schedule a time to be interviewed please call us toll free at 1-800-727-5016 extension 401.
When calling, please mention the survey identification number 204A - <Insert Record Number>

Thank you very much. Goodbye

1. LEFT MESSAGE – **ASSIGN LIVE MESSAGE DISPOSITION AND END**
2. *TERMINATE – **ASSIGN NO ANSWER DISPOSITION AND END***

  CHOICE 1 ONLY AVAILABLE AT 1ST INSTANCE OF LIVE MESSAGE, CLEAR MESSAGE FOR 2ND AND FOLLOWING

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DIALING

AGENCY: <Agency name>
CONTACT NAME: <Contact person's name>
PHONE NUMBER: EXTENSION: RECORD NUMBER:

USE THIS SCREEN TO ASSIGN DISPOSITIONS IF THE PHONE IS NOT ANSWERED, WRONG NUMBER, OR N0T A BUSINESS

01. NO ANSWER   - **DISP**
02. BUSY - **DISP**
03. ANSWERING MACHINE   **(SKIP ANSMACH)**
04. TECH BARRIER - **DISP (2nd instance Final Tech Barrier)**
05. HANGUP   **ASSIGN NO ANSWER DISPOSITION**
06. FAX/ MODEM – **DISP (2nd instance Not a business)**
14. FAST BUSY/ NOISE/ DEAD AIR - **DISP (Second instance Disc. / Nonworking)**
23. DISCONNECTED/ NONWORKING - **DISP**
25. NOT A BUSINESS **(Set disposition terminate THANX)**
30. WRONG NUMBER **(NOT NAMED AGENCY) SKIP THANX**
99. CONTINUE TO INTRO1

INTRO1

<SHOW PHONE NUMBER AND RECORD NUMBER >
Hello, my name is _____ calling from Clearwater Research. We are conducting a survey on behalf of PERSI. May I please speak with < CONTACT NAME > or the payroll department ?

        11   BEGIN INTERVIEW WITH <CONTACT>
        13   ENTER NEW RESPONDENT NAME
        14   ENTER NEW PHONE NUMBER
        15   ENTER NEW EXTENSION

        17   VOICE MAIL / ANSWERING MACHINE **SKIP ANSMACH**
        18   LEAVE MESSAGE WITH A PERSON **SKIP LIVEMSG**
        19   REFUSAL BY SOMEONE OTHER THAN <CONTACT> **ASSIGN FINAL REFUSAL**
                        NOT SELECTED, SKIP REF
        20   NOT AVAILABLE UNTIL AFTER <LAST DAY OF CALLING PERIOD> **DISP SKIP**
                        THANX
        21   SET CALLBACK **SKIP CALLBACK**

NEWNAME - ASK WHEN NEW NAME IS NEEDED

INTERVIEWER:
ENTER THE NAME OF THE PERSON YOU WILL BE INTERVIEWING

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_____

NEWACC - ASK WHEN NEW PHONE NUMBER IS NEEDED

ENTER THE AREA CODE

(___)

NEWNUM- ASK WHEN NEW PHONE NUMBER IS NEEDED

ENTER NEW PHONE NUMBER (DO NOT USE A DASH "-")

(XXX) _____

*** THIS NUMBER SHOULD BE WRITTEN BACK TO SAMPLE FOR USE ON NEXT ATTEMPTS **

ASKEXT- ASK WHEN NEW PHONE NUMBER IS NEEDED

ENTER NEW PHONE NUMBER EXTENSION, ENTER 0 IF NONE

(XXX) XXXXXXX _____

*** THIS NUMBER AND EXTENSTION SHOULD BE WRITTEN BACK TO SAMPLE FOR USE ON NEXT ATTEMPTS **
*** SET TEMPORARY DISPOSITION NEW NUMBER IN CASE OF CONTROL END AT NEXT SCREEN***

REDIAL

Thank you for your time and I am sorry if I have caused any inconvenience.

INTERVIEWER:
HAND DIAL THIS NUMBER: <NEW PHONE NUMBER>
AND THEN PRESS "1" TO CONTINUE

PRESS 1 TO CONTINUE

RETURNS TO INTRO1

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INTRO2

<Hello, my name is _____calling from Clearwater Research. We are conducting a survey on behalf of PERSI. >**DISPLAY WHEN INTRO1 IS NOT 11**

All responses to this survey will be kept strictly confidential. Is now a convenient time to complete the survey?

1. YES
2. NO – REFUSED **SKIP REF ASSIGN REFUSED SELECTED**
3. VOICE MAIL / ANSWERING MACHINE **SKIP ANSMACH**
4. LEAVE MESSAGE WITH A PERSON **SKP LIVEMSG**
5. SET CALLBACK

Q005

Are you the person who has routine contact with PERSI?

1. YES   **CONTINUE TO Q010**
2. NO - Could you please transfer me to the person who does?
3. NO - RECORD NEW NAME
4. NOT AVAILABLE NOW   **TRY TO SCHEDULE CALL BACK, RECORD NAME IF NEW**
5. REFUSED   **SKIP TO REF ASSIGN REFUSED SELECTED**

Q010

Consider your experiences with PERSI in the past year. How satisfied or dissatisfied overall are you with PERSI?

Would you say you are. . .

1. Extremely satisfied
2. Somewhat satisfied
3. Neither satisfied nor dissatisfied
4. Somewhat dissatisfied, or
5. Extremely dissatisfied
7. DON'T KNOW
9. REFUSED

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Q015

How satisfied or dissatisfied are you with the current transmittal reporting process?

Would you say you are . . .

      1. Extremely satisfied
      2. Somewhat satisfied
      3. Neither satisfied nor dissatisfied
      4. Somewhat dissatisfied, or
      5. Extremely dissatisfied
      6. NO EXPERIENCE WITH TRANSMITTAL REPORT –**SKIP TO Q045**
      7. DON'T KNOW
      9. REFUSED

Q020   GET IF Q015 <> 6

How easy is it to submit your transmittal reports to PERSI? Would you say it is. . .

      1. Very easy
      2. Somewhat easy
      3. Somewhat difficult, or
      4. Very difficult

      7. DON'T KNOW
      9. REFUSED

Q025   GET ONLY IF Q020 < 7

Can you please describe why you felt the transmittal reporting process is <Q020 response>?

      1. OPEN – **CAPTURE RESPONSE AS Q025TEXT**

      7. DON'T KNOW
      9. REFUSED

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Q030   GET IF Q015 <> 6

In the past year, have you had any problems submitting transmittal reports to PERSI?

> 1. YES
> 2. NO
>
> 7. DON'T KNOW
> 9. REFUSED

Q065 GET ONLY IF Q030 = 1

What problem did you encounter in submitting your organization's transmittal reports to PERSI?

> OPEN: - **CAPTURE RESPONSE AS Q065TEXT**
>
> 7. DON'T KNOW
> 9. REFUSED

Q040 GET ONLY IF Q030 = 1

Who do you usually contact first when you encounter a problem submitting your organization's transmittal reports to PERSI? Would you say it was a . . .

> 1. Supervisor,
> 2. A peer or co-worker,
> 3. PERSI technical representative, or
> 4. Someone else at PERSI
> 5. OTHER (SPECIFY)
> 7. DON'T KNOW
> 9. REFUSED

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Q045 - QUESTIONS Q045 THROUGH Q060 ONLY ASKED WHEN CALLING IN OCTOBER - DECEMBER AND JANUARY – MARCH, OTHERWISE SKIP TO Q065

How satisfied or dissatisfied are you with the PERSI annual audit process?

Would you say you are . . .

   1. Extremely satisfied
   2. Somewhat satisfied
   3. Neither satisfied nor dissatisfied
   4. Somewhat dissatisfied, or
   5. Extremely dissatisfied

   6. HAVE NOT HAD AUDIT – **SKIP TO Q065**
   7. DON'T KNOW
   9. REFUSED

Q050   GET ONLY IF Q045 < 6

How easy is it to participate in the annual audit? Would you say it is. . .

   1. Very easy
   2. Somewhat easy
   3. Somewhat difficult, or
   4. Very difficult

   7. DON'T KNOW
   9. REFUSED

Q055   GET ONLY IF Q050 < 7

Can you please describe why you feel the annual audit process is <Q050 response text>?

   1. OPEN – **CAPTURE RESPONSE AS Q055TEXT**

   7. DON'T KNOW
   9. REFUSED

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Q060

Which of the following best describes the overall usefulness of the annual audit process?

1. Mostly useful
2. Somewhat useful
1. Somewhat useless
2. Mostly useless
7. DON'T KNOW / I DO NOT UNDERSTAND
9. REFUSED

Q065

In the past twelve months, how many times have you had made an information or service request of PERSI?

__ ENTER NUMBER

0 NONE - **SKIP TO INTRO3**
76. 76 OR MORE TIMES
77. DON'T KNOW
99. REFUSED

Q070 GET ONLY IF Q065 > 0

For the next few questions, please consider your most recent request to PERSI staff. What was the general nature of the request you made on that occasion?

1. ELIGIBILITY DETERMINATION
2. *401 (k) QUESTION*
3. TRANSMITTAL REPORTING
4. REQUEST FOR FORMS OR MATERIALS TO HELP ANSWER QUESTION
5. NO INFORMATION OR REQUEST MADE – **SKIP TO INTRO3**
6. OTHER (SPECIFY) – **CAPTURE RESPONSE AS Q070TEXT**

7. DON'T KNOW
9. REFUSED

Clearwater
R e s e a r c h , I n c .

Q075 GET ONLY IF Q065 > 0 AND Q070 <> 5

How did you make your most recent request? Was it by . . .

    1. Telephone
    2. E-mail or
    3. Letter
    4. OTHER (SPECIFY) – **CAPTURE AS Q075TEXT**

    7. DON'T KNOW
    9. REFUSED

Q080   GET ONLY IF Q065 > 0 AND Q070 <> 5

How satisfied or dissatisfied are you with the way your most recent request was handled?

Would you say you are . . .

    1. Extremely satisfied
    2. Somewhat satisfied
    3. Neither satisfied nor dissatisfied
    4. Somewhat dissatisfied, or
    5. Extremely dissatisfied
    7. DON'T KNOW
    9. REFUSED

Q085   GET ONLY IF Q080 < 7

Would you please describe why you feel <Q080 response text> about your most recent information request?

    1. OPEN – **CAPTURE RESPONSE AS Q085TEXT**

    7. DON'T KNOW
    9. REFUSED

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204_Employer_2004_report_NOCOMMENTS.doc

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R e s e a r c h , I n c .

64

Q090   GET ONLY IF Q065 >0 AND Q070 <> 5

How many times did you contact PERSI staff regarding your most recent request?

    01-75. ENTER NUMBER

    76. 76 OR MORE
    77. DON'T KNOW
    99. REFUSED

Q095   GET ONLY IF Q065 >0 AND Q070 <> 5

How much time was required by PERSI staff to handle your most recent request? Would you say it was . . .

    1. The same day
    2. A couple of days   – LESS THAN A WHOLE WEEK
    3. A week   – ONE WEEK OR MORE BUT LESS THAN 2 WEEKS
    4. A couple of weeks, or   – TWO WEEKS OR MORE BUT LESS THAN A MONTH
    5. A month or more

    7. DON'T KNOW
    9. REFUSED

Q100   GET ONLY IF Q065 >0 AND Q070 <> 5

How much time should it ideally take for PERSI to handle your most recent request? Would you say. . .

    1. The same day
    2. A couple of days   – LESS THAN A WHOLE WEEK
    3. A week   – ONE WEEK OR MORE BUT LESS THAN 2 WEEKS
    4. A couple of weeks, or   – TWO WEEKS OR MORE BUT LESS THAN A MONTH
    5. A month or more

    7. DON'T KNOW
    9. REFUSED

Clearwater
R e s e a r c h , I n c .

Q105   GET ONLY IF Q065 > 0 AND Q070 <> 5

Which of the following best describes the overall usefulness of the information you received from PERSI?

IF NEEDED: INFORMATION RESPONDING TO MOST RECENT INFORMATION REQUEST

1. Very useful
2. Somewhat useful
3. Somewhat useless
4. Mostly useless

7. DON'T KNOW / I DO NOT UNDERSTAND
9. REFUSED

Q110   GET ONLY IF Q065 > 0 AND Q070 <> 5

How satisfied or dissatisfied are you with the accuracy of the information you received from PERSI staff regarding your request.?

Would you say you are . . .

1. Extremely satisfied
2. Somewhat satisfied
3. Neither satisfied nor dissatisfied
4. Somewhat dissatisfied, or
5. Extremely dissatisfied
7. DON'T KNOW
9. REFUSED

INTRO3

For the next few questions, please tell me whether you agree or disagree with each statement.

Q115

PERSI effectively communicates transmittal reporting requirements to me. Do you . . .

1. Strongly agree
2. Somewhat agree
3. Neither agree nor disagree
4. Somewhat disagree, or
5. Strongly disagree
6. NO COMMUNICATION ON TRANSMITTAL REPORTING
7. DON'T KNOW
9. REFUSED

Q120

PERSI effectively communicates electronic fund transfer requirements to me. Do you . . .

       1. Strongly agree
       2. Somewhat agree
       3. Neither agree nor disagree
       4. Somewhat disagree, or
       5. Strongly disagree
       6. NO COMMUNICATION FROM PERSI ON ELEC. FUND TRANSFER
       7. DON'T KNOW
       9. REFUSED

Q125

PERSI effectively communicates annual audit expectations to me. Do you . . .

       1. Strongly agree
       2. Somewhat agree
       3. Neither agree nor disagree
       4. Somewhat disagree, or
       5. Strongly disagree
       6. NO COMMUNICATIONS FOR ANNUAL AUDIT
       7. DON'T KNOW
       9. REFUSED

Q130 (ALLOW UP TO THREE RESPONSES)

Think back on your experiences communicating with PERSI over the past year. What additional services or changes you would like to see?

AFTER FIRST RESPONSE: Are there any others?

       11. PROVIDE BETTER NOTIFICATION/ TOP DOWN INFORMATION FLOW
       12. IMPROVE RESPONSE TO INFORMATION REQUESTS / ACCESS TO
                INFORMATION
       13. IMPROVE TRANSMITTAL / ELECTRONIC FILING PROCEDURES
       14. TRAINING FOR PAYROLL PERSONNEL
       15. IMPROVE MEMBER ACCESS TO PLAN/ ACCOUNT INFORMATION
       16. PROVIDE MEMBER TRAINING RETIREMENT PLANNING / BENEFITS
       17. OTHER (SPECIFY)
       18. NO / NONE
       77. DON'T KNOW/ NOT SURE
       99. REFUSED
       88. NO OTHERS

Clearwater
R e s e a r c h , I n c .

CLOSE / TERMINATION SCRIPT

Those are all of my questions for now. Please be aware that PERSI has several on-going service monitoring projects, so we may possibly contact you again. Do you have any questions about the survey?

PERSI and I thank you for taking the time to give us this information! Goodbye.

CALLBACK

When would be a good time to call back?

> PRESS 1 TO TERMINATE AND SET CALLBACK DISPOSITION

<SHOULD RETURN TO DIALING SCREEN FOR NEXT ATTEMPT>

REF – GET IF REFUSED AT INTRO1, ATLCON, INTRO2 or Q005

Sorry to have bothered you. Thank you for your time. Good bye.

> PRESS 1 TO TERMINATE

<REFUSAL DISPOSITION AS FROM RESPONSE TO INTRO1, ALTCON, OR INTRO2>

THANX – GET IF DIALING = 25 OR 30, INTRO1 = 20

Sorry to have bothered you. Thank you for your time. Good bye.

> PRESS ANY KEY TO TERMINATE

<SET DISPOSITION FROM PREVIOUS RESPONSE>

MSGTXT – GET AFTER ANSMACH OR LIVEMSG

INTERVIEWER: DID EITHER THE ANSWER MACHINE OR PERSON SPOKEN TO INDICATE GENERAL OFFICE AVAILABLE HOURS FOR THE NAMED CONTACT?

1. YES

2. NO - ENDS

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R e s e a r c h , I n c .

TIMES – GET IF MSGTXT = 1

WHAT WAS THE STARTING TIME OF AVAILABLITY?

1 9AM OR EARLIER
2 10AM
3 11AM
4 12AM
5 1PM
6 2PM
7 3PM
8 4PM OR LATER
9 NO TIME LIMIT – SKIPS TO DAYA

TIMEE – GET IF DIALING = 25 OR 30, INTRO1 = 20

WHAT WAS THE ENDING TIME OF AVAILABLITY?

1 9AM OR EARLIER
2 10AM
3 11AM
4 12AM
5 1PM
6 2PM
7 3PM
8 4PM OR LATER

DAYA

WHAT DAY IS THE SUBJECT AVAILABLE OR OFFICE OPEN?

1 MONDAY
2 TUESDAY
3 WEDNESDAY
4 THURSDAY
5 FRIDAY
6 ANY

IF MORE THAN ONE DAY PICK EARLIEST DAY OF WEEK

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R e s e a r c h ,   I n c .